Employee Set Up for Medicare Overview

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take on the **Benefits Personal Data** page before enrolling an employee in Medicare benefits.

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.

Table of Contents

Revision History

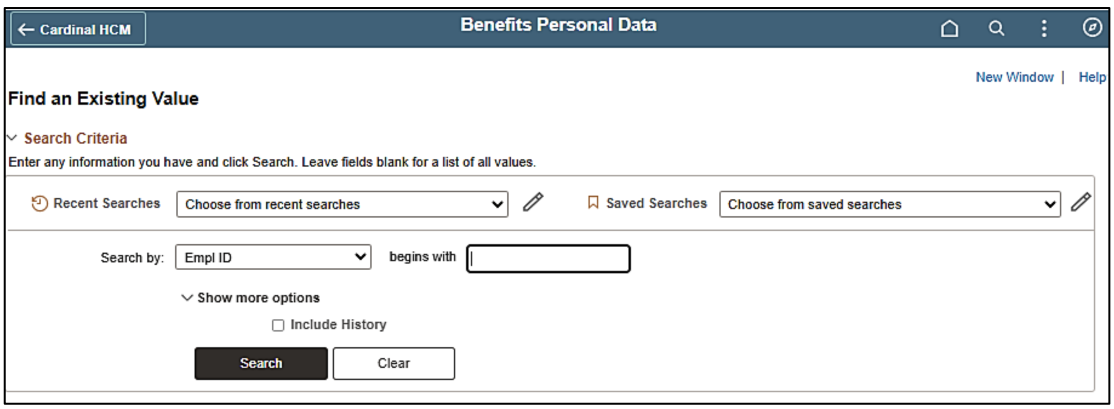
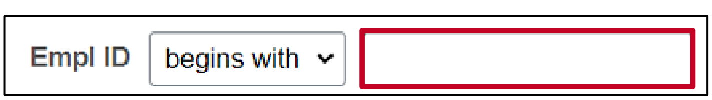
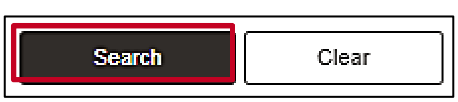
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
2/25/2026	Baseline.

Scenario 1: Employee Turns 65 (with single coverage)

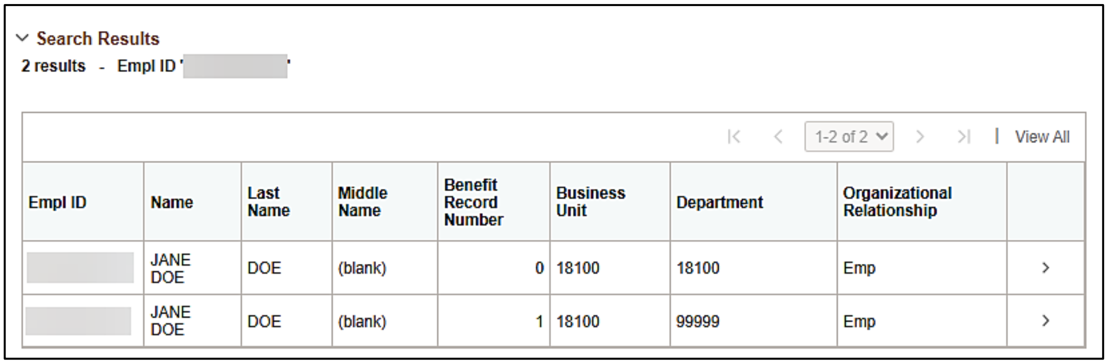
In this scenario the employee has single coverage, turns 65, and is eligible for Medicare. The following actions taken by the BA are completed after the employee has been moved to a job that reflects the “Retiree” status and has a Benefit Program of “RET” or a TLC program.

The Benefits Personal Data Page
Before enrolling a retired employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

Note: Not all pages in this process are available from the **Benefits WorkCenter**. Therefore, this Job Aid may use both the **WorkCenter** and the **NavBar** to navigate to the applicable pages.

Step	Action
1.	Navigate to the **Benefits Personal Data** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Benefits Personal Data**
	The **Benefits Personal Data 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**.
2.	Enter the retiring employee’s Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. 
3.	Click the **Search** button. 

Step	Action
The Search Results display.	

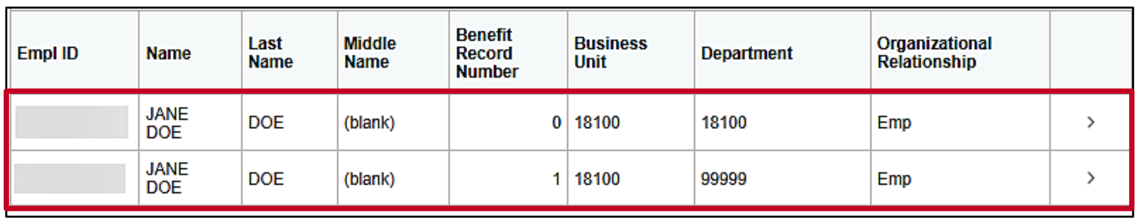


Search Results

2 results - Empl ID '

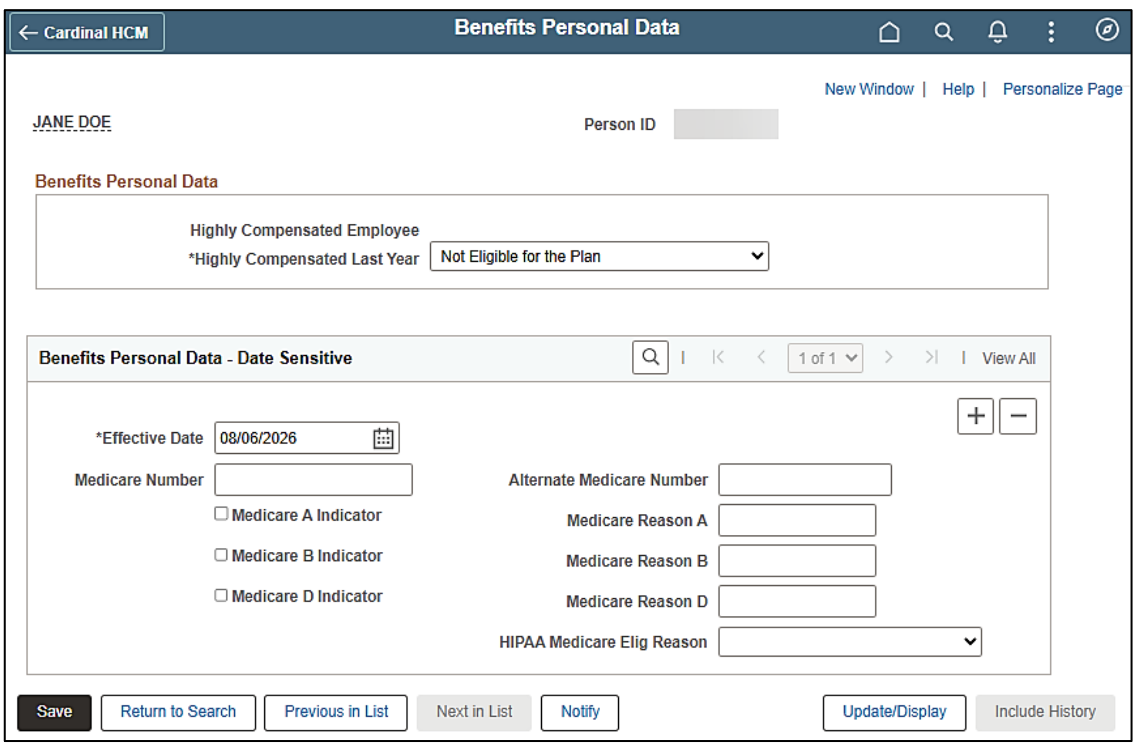
Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship	
	JANE DOE	DOE	(blank)	0	18100	18100	Emp	>
	JANE DOE	DOE	(blank)	1	18100	99999	Emp	>

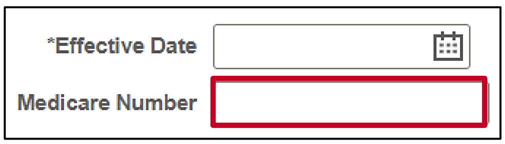
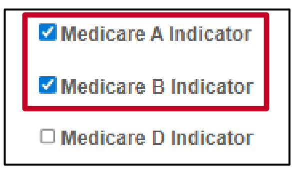
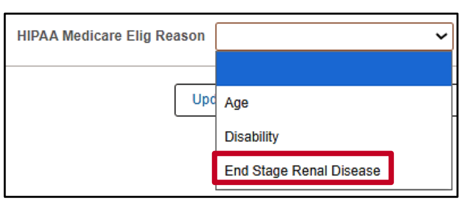
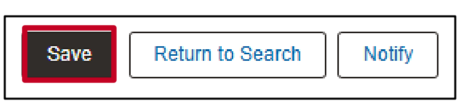
Step	Action
4.	Click the **Drill In** (**>**) icon on any row in the Search Results.



Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship	
	JANE DOE	DOE	(blank)	0	18100	18100	Emp	>
	JANE DOE	DOE	(blank)	1	18100	99999	Emp	>

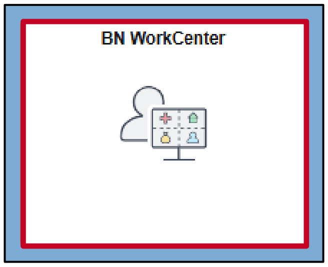
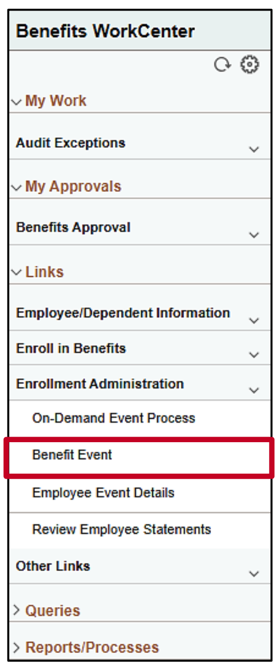
The **Benefits Personal Data** page displays.

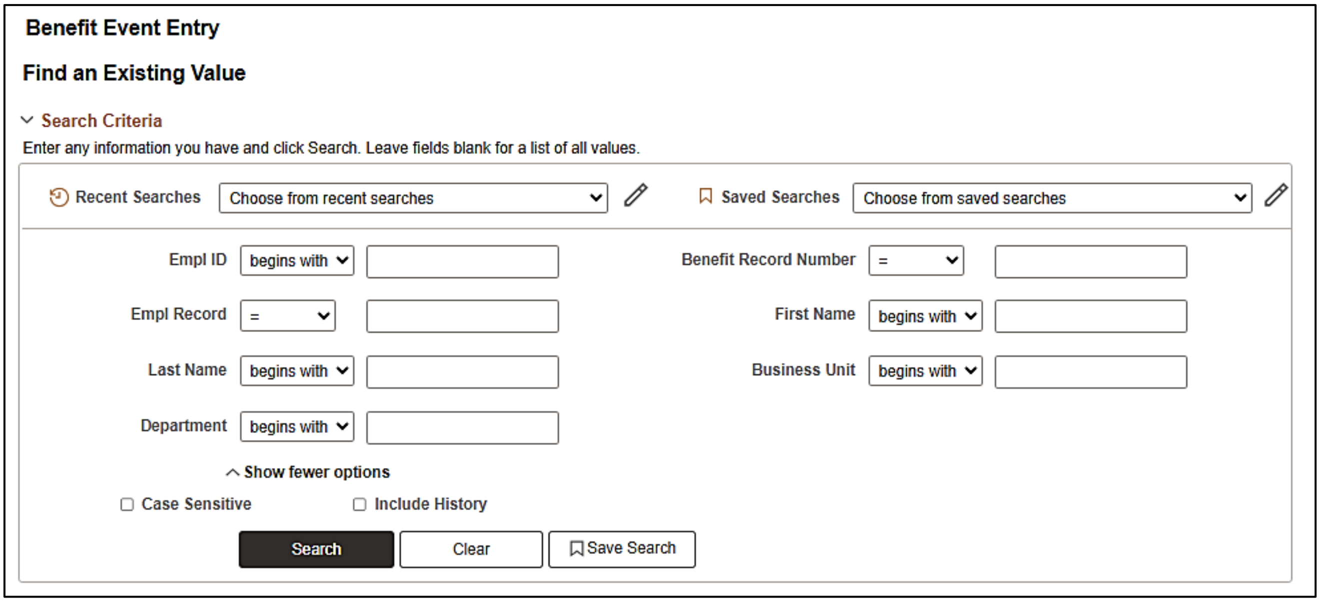


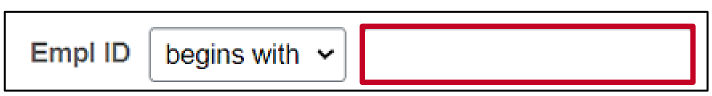
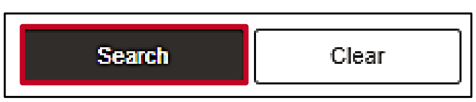
Step	Action
5.	Click the **Effective Date Calendar** icon in the **Benefits Personal Data – Date Sensitive** section and select the first day of the month in which the retiring employee turns 65. **Note**: If the employee is 65 or older at the time of retirement, use the first of the month of the retirement. 
	The **Medicare Number** field will be entered by the Agency BA upon receipt. Dashes are not accepted in the field. **Note**: Prescription coverage may be delayed until the Medicare Number is provided. 
6.	Select both the **Medicare A Indicator** and the **Medicare B Indicator** checkbox options. **Note**: The **Medicare D Indicator** is not used in Cardinal and should not be selected. 
	For End Stage Renal Disease, the **Medicare A**, **B**, and/or **D Indicator** checkbox options will not be checked. OHB is establishing the record for End Stage Renal Disease (ESRD).
7.	Click the **HIPAA Medicare Elig Reason** dropdown button and select either “Age” or “Disability” as the applicable HIPPA Medicare eligibility reason. **Note**: The HIPAA Medicare eligibility reason of “End Stage Renal Disease” is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary. 
8.	Click the **Save** button. 

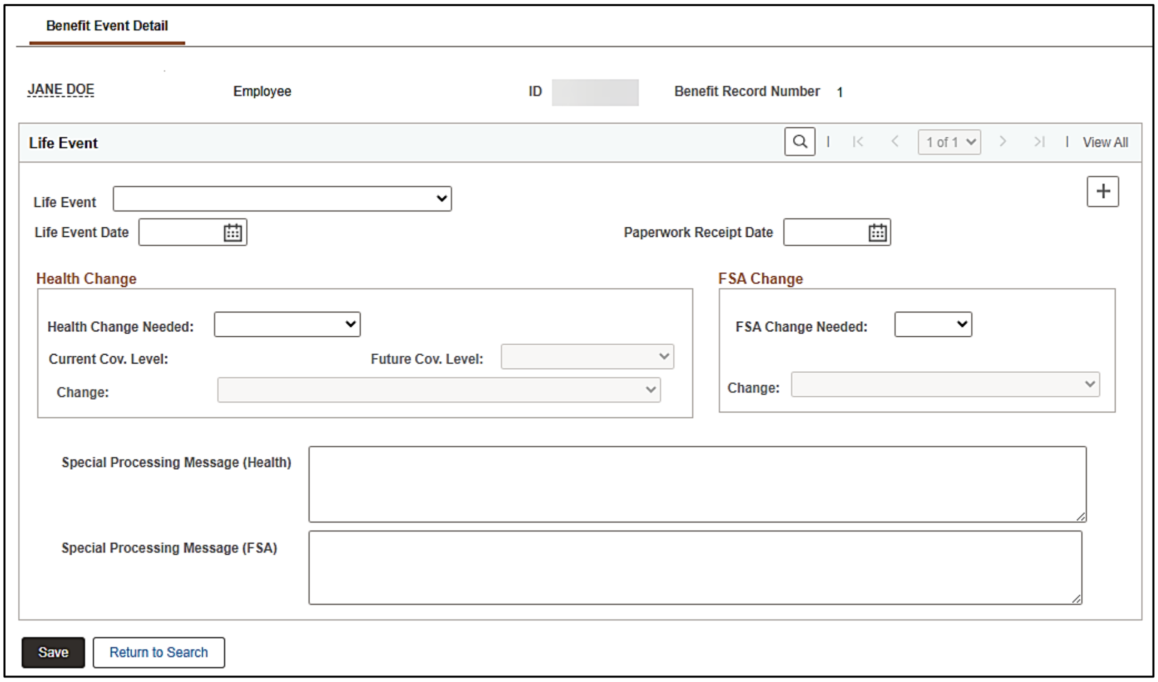
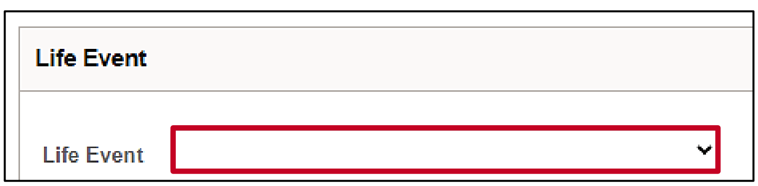
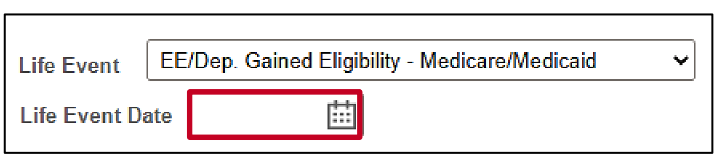
Process the Medicare Manual Event

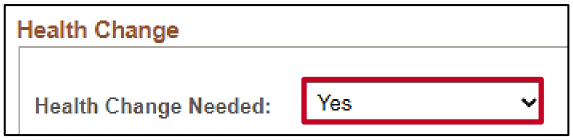
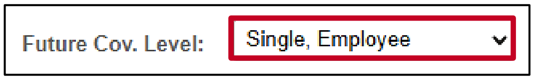
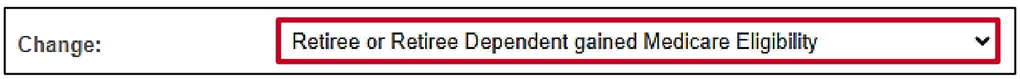
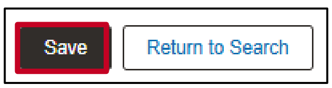
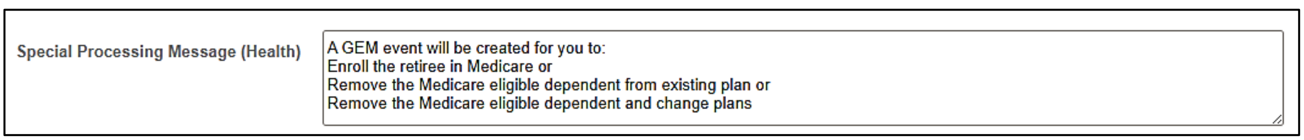
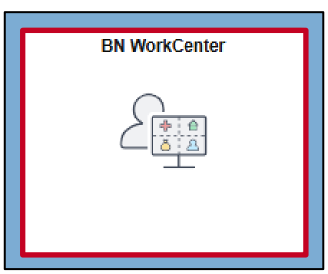
To enroll the retiring employee in Medicare, the Benefits Administrator (BA) must create a Benefit Event.

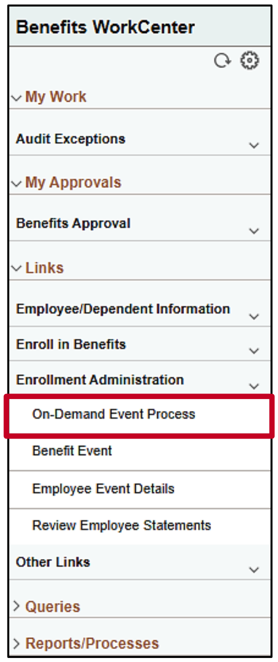
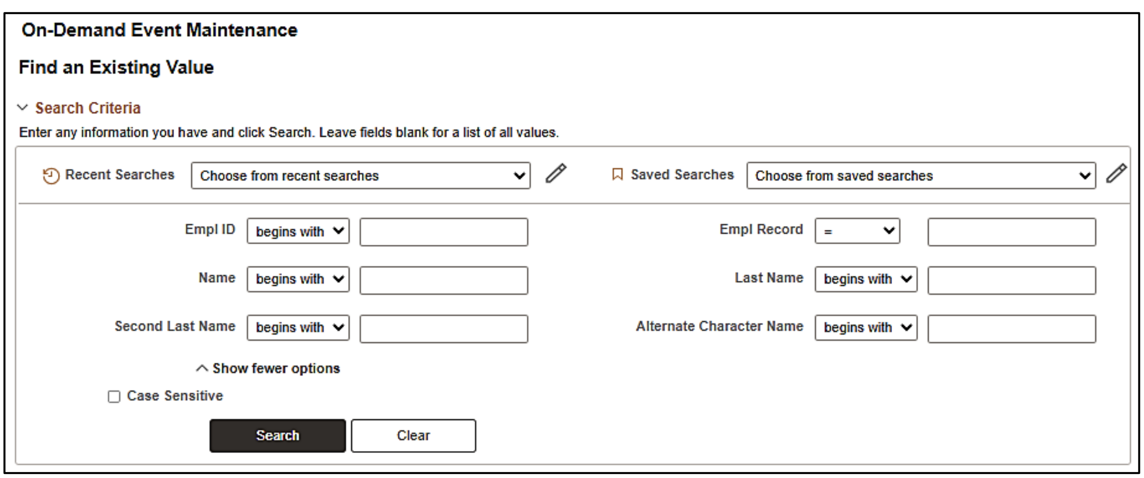
Step	Action
1.	Navigate to the **Benefit Event Detail** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following 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. 
	Users can also access the **Benefit Event Detail** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Benefit Event Entry Find an Existing Value Search page displays.

</td></tr>
<tr><td></td><td>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.</td></tr>
<tr><td>3.</td><td>Enter the retiring employee’s Employee ID in the Empl ID field.

Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

</td></tr>
<tr><td>4.</td><td>Click the Search button.

</td></tr>
</table>

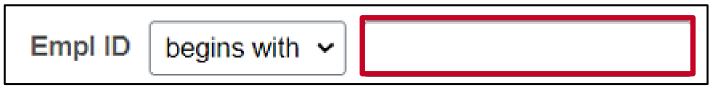
Step	Action
	The **Benefit Event Detail** page displays. 
5.	Click the **Life Event** dropdown button and select “EE/Dep. Gained Eligibility – Medicare/Medicaid” list item. 
6.	Enter the Effective Date in the **Life Event Date** field. **Note**: The Life Event Date is the first of the month in which the retiring employee is eligible for Medicare. 
7.	Enter the **Paperwork Receipt Date**. 

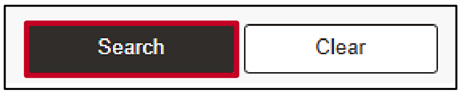
Step	Action
8.	Click the **Health Change Needed** dropdown button and select “Yes”. 
9.	Click the **Future Cov. Level** dropdown button and select “Single, Employee”. 
10.	Click the **Change** dropdown button and select “Retiree or Retiree Dependent gained Medicare Eligibility”. 
11.	Click the **Save** button. 
	A **Special Processing Message (Health)** displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created. 
	Now that the GEM Event has been created, the Benefit Event must be processed.
12.	Navigate to the **On-Demand Event Process** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.

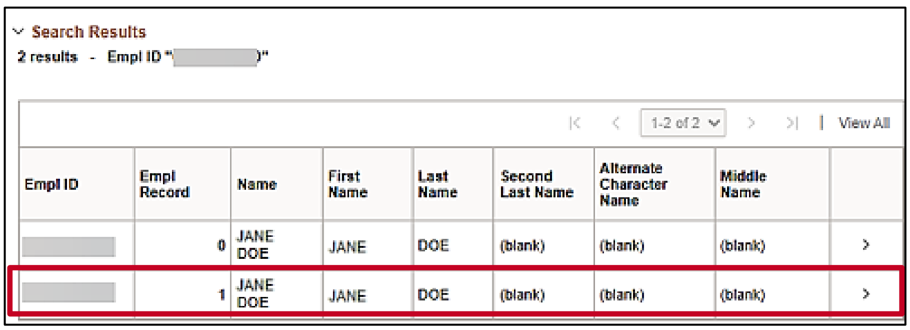
Step	Action
13.	Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > On-Demand Event Process** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **On-Demand Event Process** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Process**
The **On-Demand Event Maintenance Find an Existing Value Search** page displays. 	

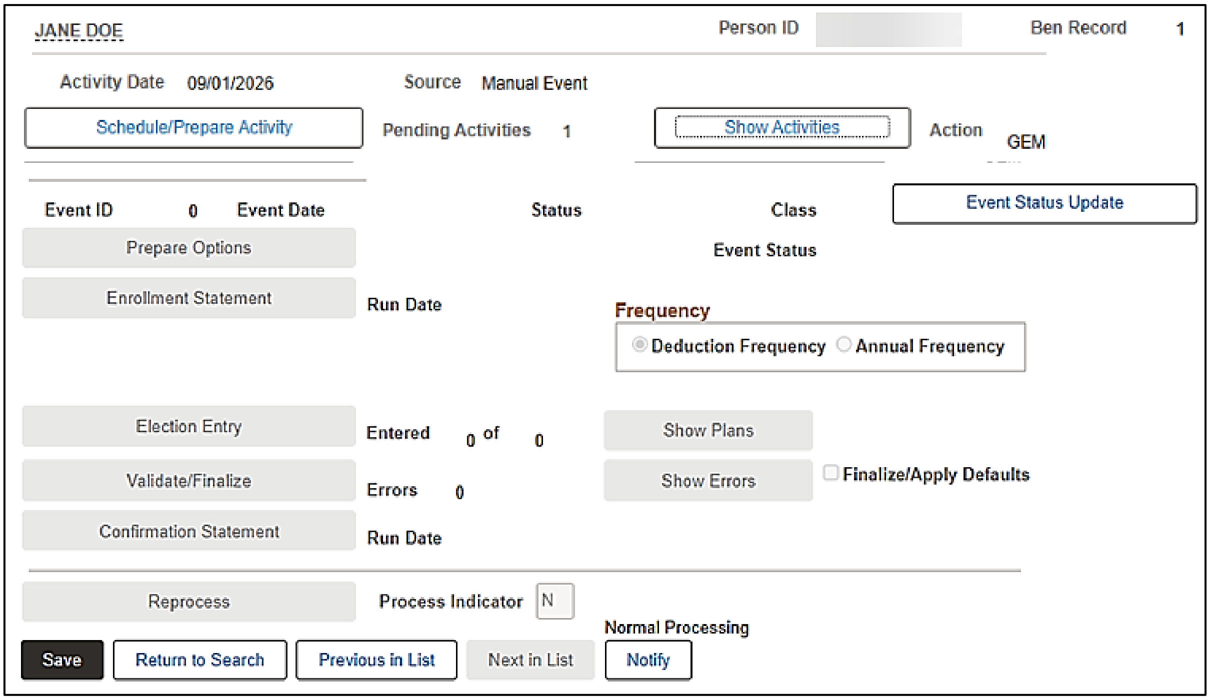
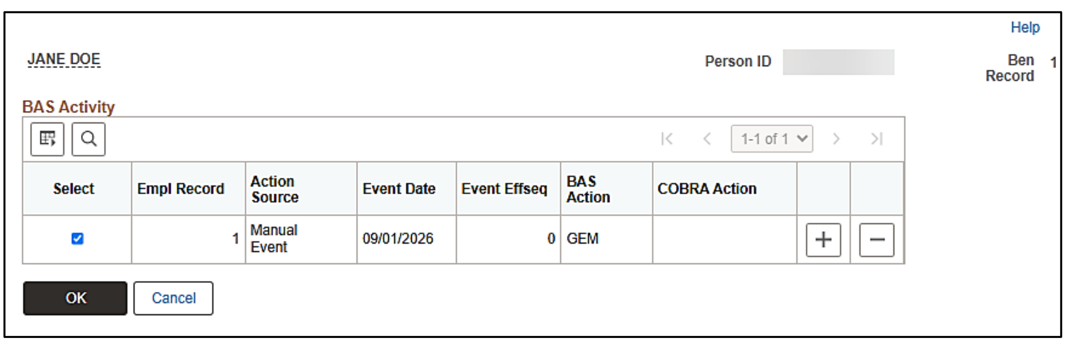
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14.</td><td>Enter the retiring employee’s Employee ID in the Empl ID field.

Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

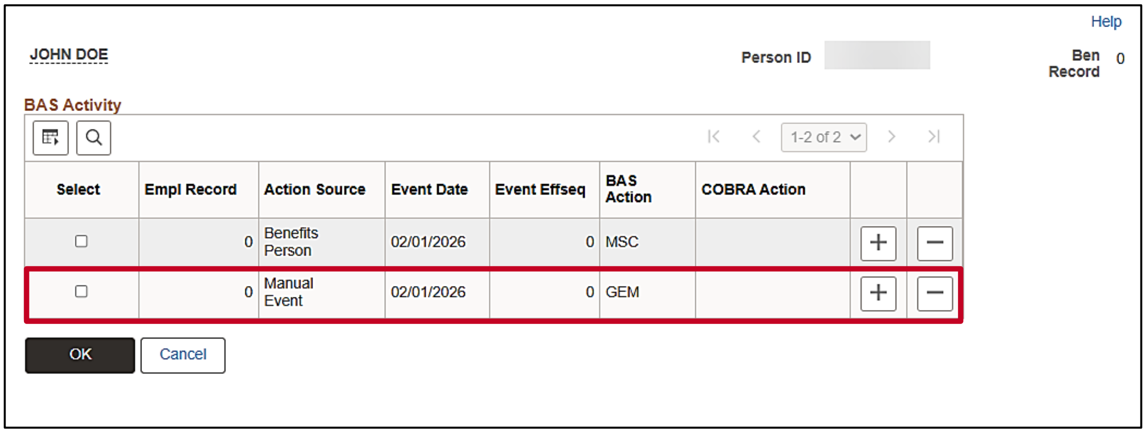

</td></tr>
<tr><td>15.</td><td>Click the Search button.


</td></tr>
<tr><td></td><td>If the On-Demand Event Process page does not display, select Empl Record “1” (or highest Empl Record number) on the On-Demand Event Maintenance Search page.

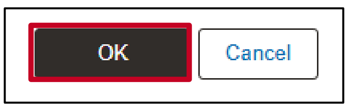

</td></tr>
</table>

Step	Action
	The **On-Demand Event Process** page displays. 
16.	Click the **Show Activities** button. 
	The **BAS Activity** page displays in a pop-up window. 

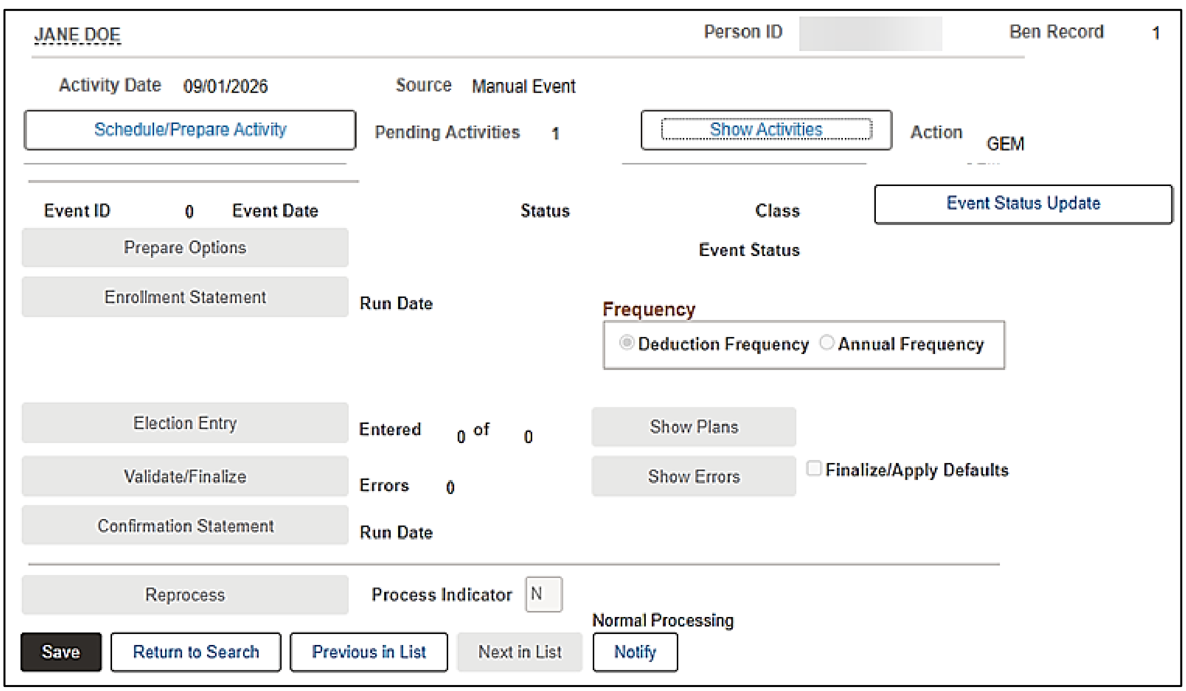
Step	Action
ℹ	If an “MSC” BAS Action is listed, select the “GEM” BAS Action. The “MSC” BAS Action will process automatically when the Ben Admin process runs.

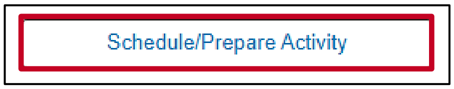
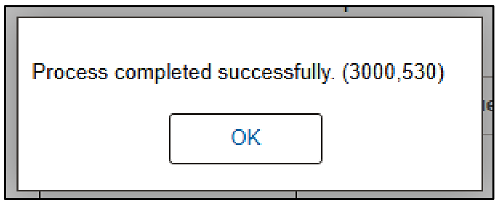
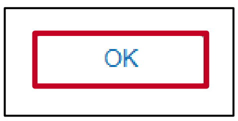
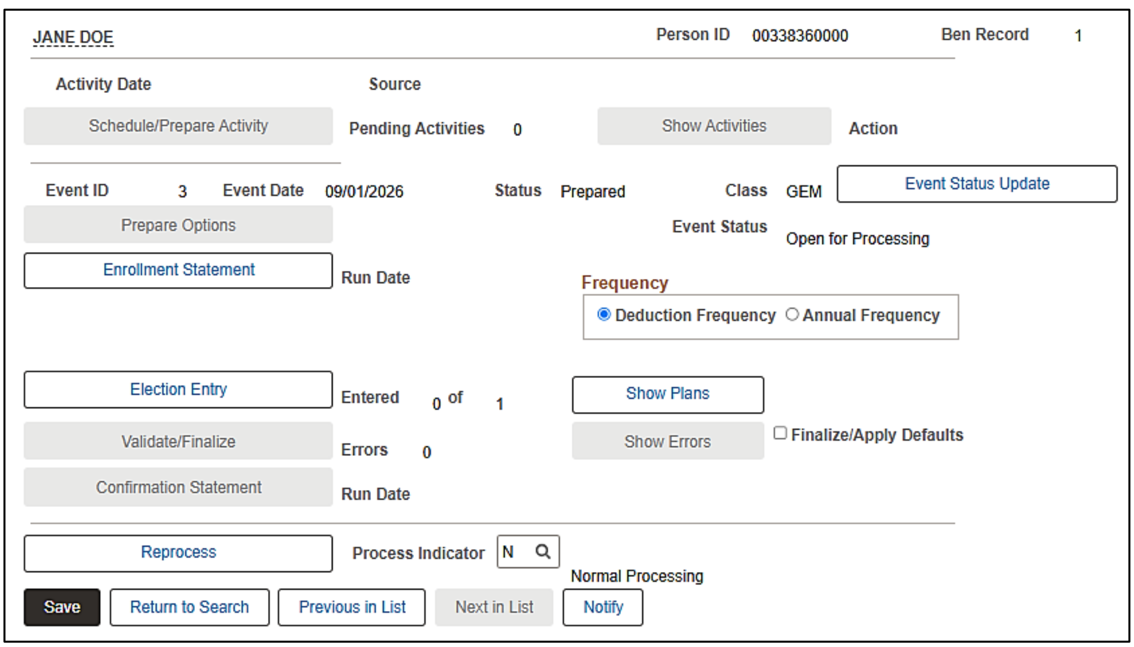
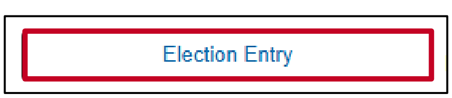


Step	Action
17.	Click the **OK** button.

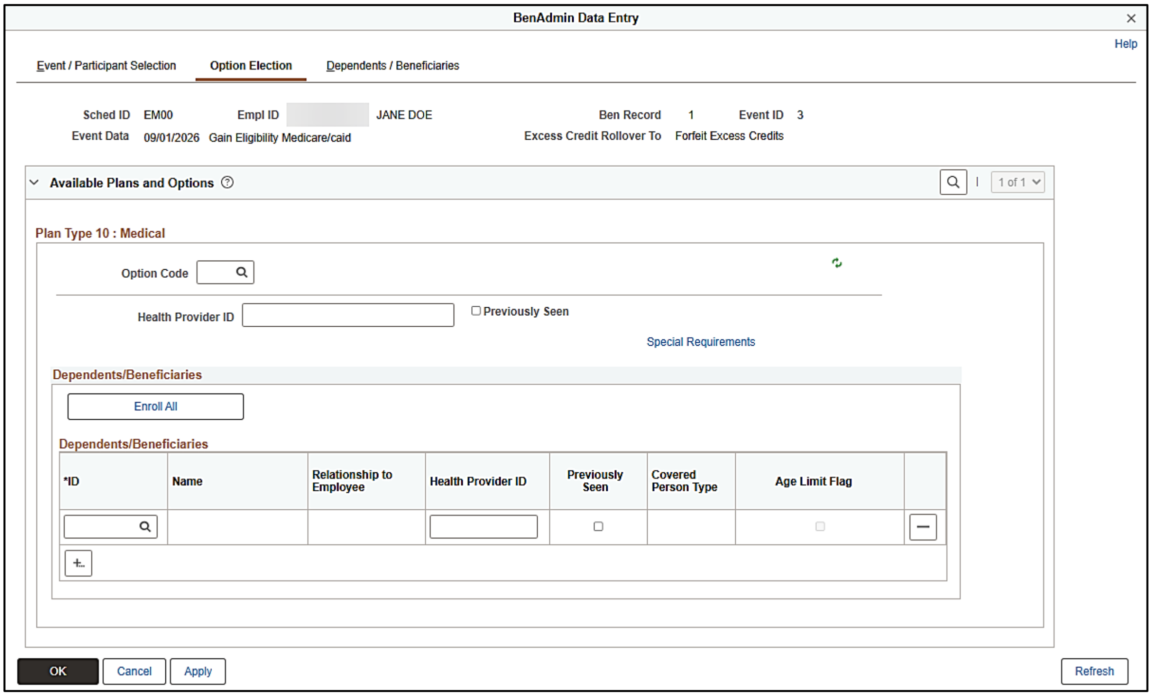


The **On-Demand Event Process** page redisplays.

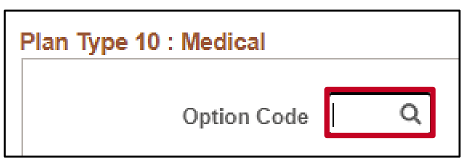


Step	Action
18.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. 
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
19.	Click the **OK** button to close the message. 
	The **On-Demand Event Process** page redisplays. 
20.	Click the **Election Entry** button. 

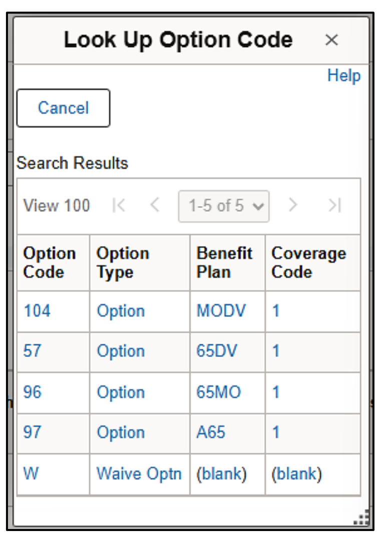
Step	Action
	The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.

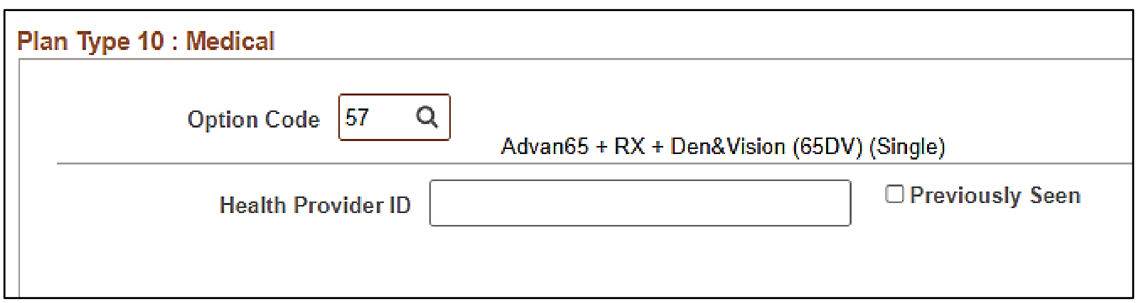


Step	Action
21.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section.



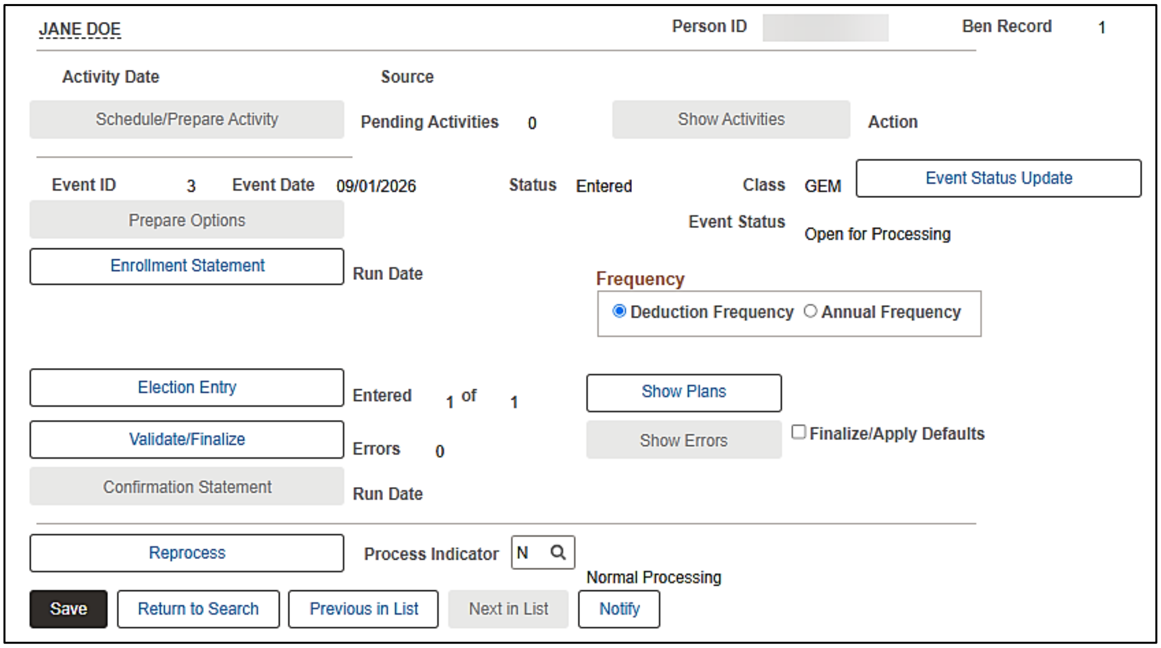
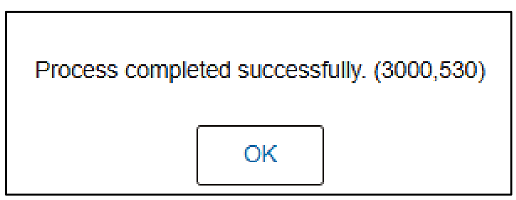
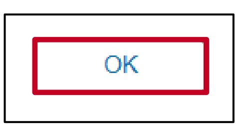
The **Look Up Option Code** page displays in a pop-up window.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
If the Over 65 Benefit Plans do not populate, ensure the Medicare information was accurately entered.
If the information is incorrect, update as needed and then complete an “Open” / “Assign Benefit Program” to the GEM Event to pick up the change.
For additional information on re-opening and reprocessing Benefit Events, see the Job Aid titled BN361 Re-opening and Reprocessing a Benefit Event located on the Cardinal website in Job Aids under Learning.
</td></tr>
<tr><td>22.</td><td>
Select the applicable Option Code. In this example, Option Code “57” is selected.
<table>
<tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr>
<tr><td>104</td><td>Option</td><td>MODV</td><td>1</td></tr>
<tr><td>57</td><td>Option</td><td>65DV</td><td>1</td></tr>
<tr><td>96</td><td>Option</td><td>65MO</td><td>1</td></tr>
<tr><td>97</td><td>Option</td><td>A65</td><td>1</td></tr>
<tr><td>W</td><td>Waive Optn</td><td>(blank)</td><td>(blank)</td></tr>
</table>
</td></tr>
<tr><td colspan="2">
The Plan Type 10: Medical section redisplays with the selected Option Code displayed.


</td></tr>
<tr><td>23.</td><td>
Click the OK button.


</td></tr>
</table>

Step	Action
	The **On-Demand Event Process** page redisplays. 
24.	Click the **Validate/Finalize** button. 
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
25.	Click the **OK** button to close the message. 

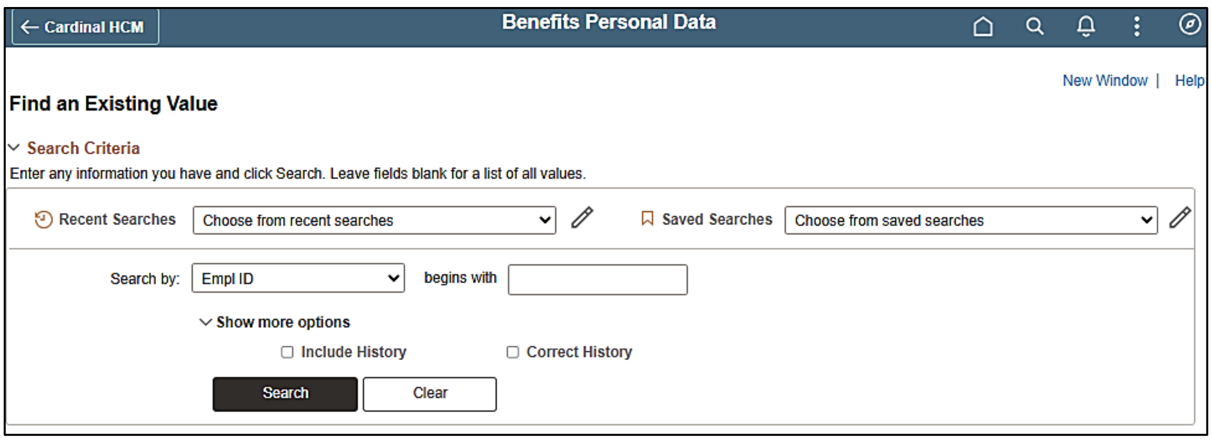
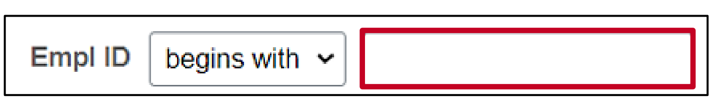
Scenario 2: Employee Turns 65 (with dependents covered)

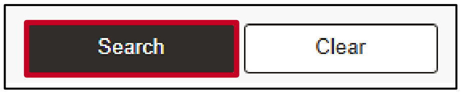
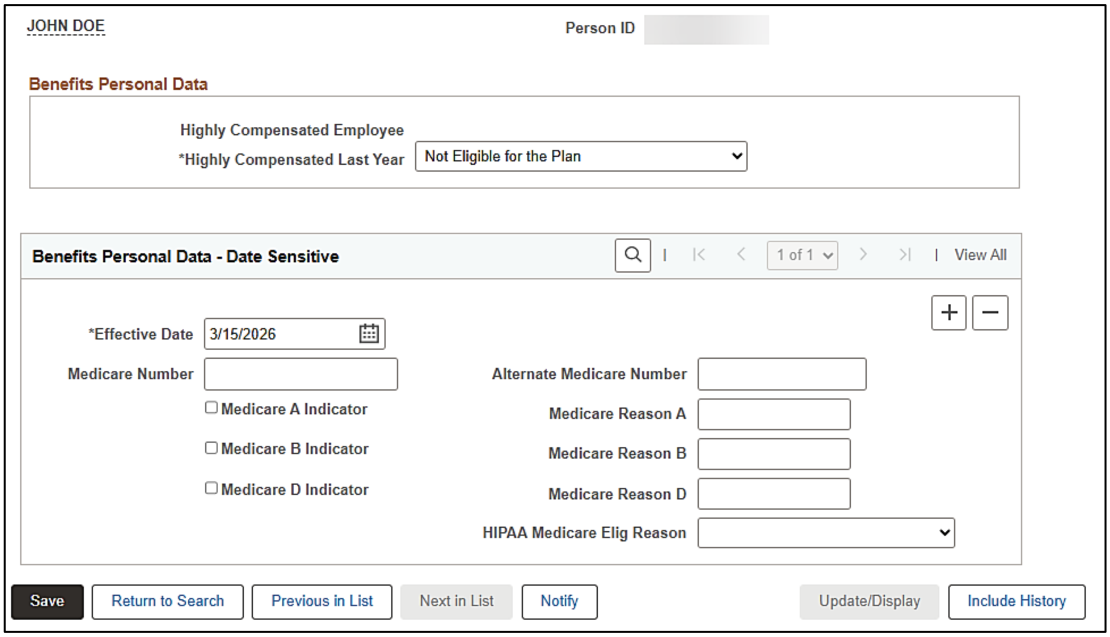
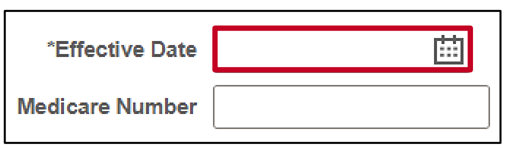
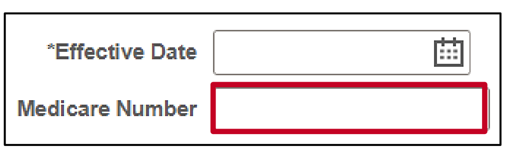
In this scenario, the employee has “Employee + Spouse” coverage, the employee turns 65 and is eligible for Medicare, however the spouse is not eligible for Medicare. The following actions taken by the BA are completed after the employee has been moved to a job that reflects the “Retiree” status and has a Benefit Program of “RET” or a TLC program.

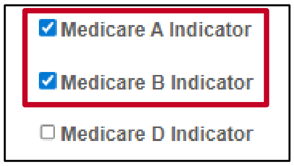
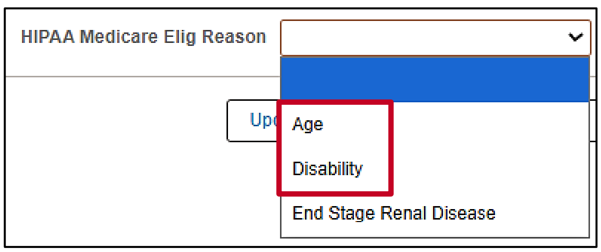
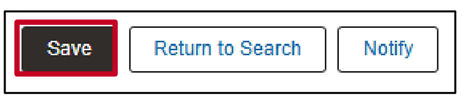
Note: If the employee turns 65 with family coverage, hire the youngest dependent as an employee.

The Benefits Personal Data Page

Before enrolling a retiring employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

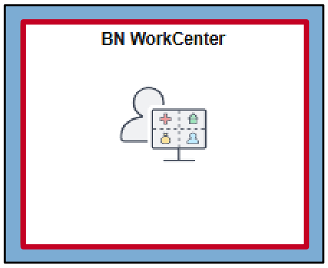
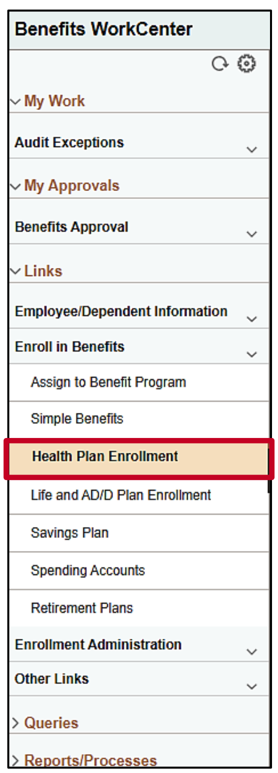
Step	Action
1.	Navigate to the **Benefits Personal Data** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Benefits Personal Data**
The **Benefits Personal Data Find an Existing Value Search** page displays.  	
	For more information pertaining to the Cardinal 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**.
2.	Enter the retiree’s Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. 

Step	Action
3.	Click the **Search** button. 
The **Benefits Personal Data** page displays for the selected retiree. 	
4.	Click the **Effective Date Calendar** icon in the **Benefits Personal Data – Date Sensitive** section and select the first day of the month in which the employee is retiring. 
	The **Medicare Number** field will be entered by the Agency BA when received, and dashes are not accepted in the field. **Note**: Prescription coverage may be delayed until the Medicare Number is provided. 

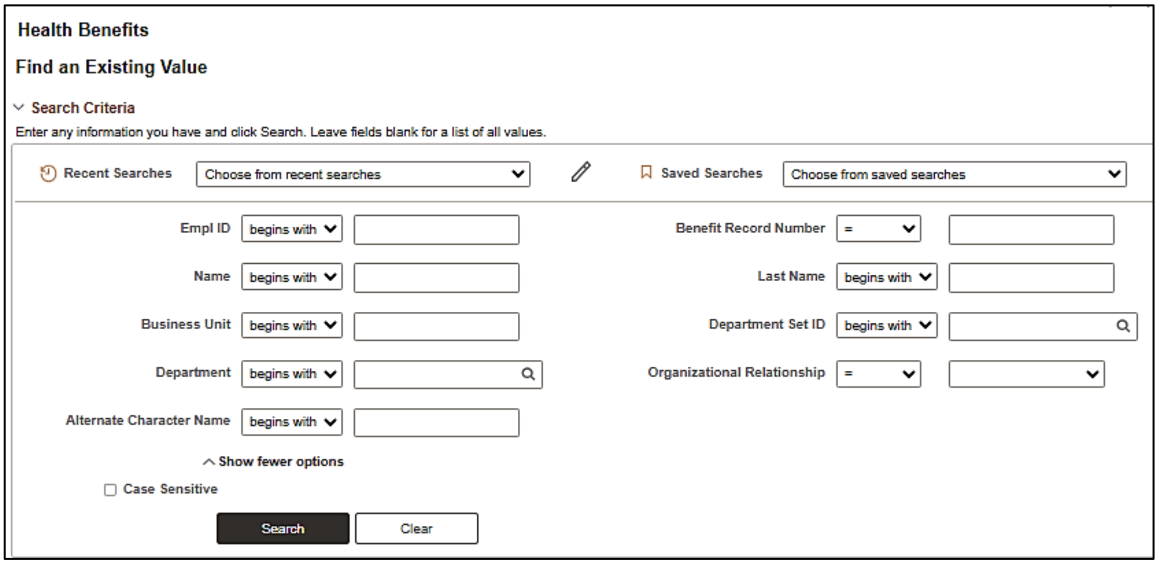
Step	Action
5.	Select both the **Medicare A Indicator** and the **Medicare B Indicator** checkbox options. **Note**: The **Medicare D Indicator** is not used in Cardinal and should not be selected. 
	For End Stage Renal Disease, the **Medicare A**, **B**, and/or **D Indicator** checkbox options will not be checked. OHB is establishing the record for End Stage Renal Disease (ESRD).
6.	Click the **HIPAA Medicare Elig Reason** dropdown button and select either “Age” or “Disability” as the applicable HIPPA Medicare eligibility reason. **Note**: The HIPAA Medicare eligibility reason of “End Stage Renal Disease” is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary. 
7.	Click the **Save** button. 

Process the Medicare Manual Event
To enroll the retiree in Medicare, the Benefits Administrator (BA) must create a Benefit Event.

Before adding the manual event for the retiree, the Agency BA must confirm that the retiree has a dependent listed on their current benefit enrollment on the **Health Plan Enrollment** page.

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

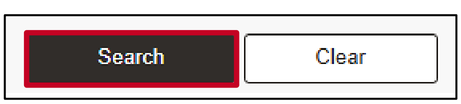
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>(i)</td><td>Users can also access the Health Plan Enrollment page using the following path:
NavBar > Menu > Benefits > Enroll in Benefits > Health Plan Enrollment</td></tr>
<tr><td colspan="2">The Health Benefits Find an Existing Value Search page displays.



</td></tr>
<tr><td>(i)</td><td>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.</td></tr>
<tr><td>3.</td><td>Enter the retiree’s Employee ID in the Empl ID field.

Note: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

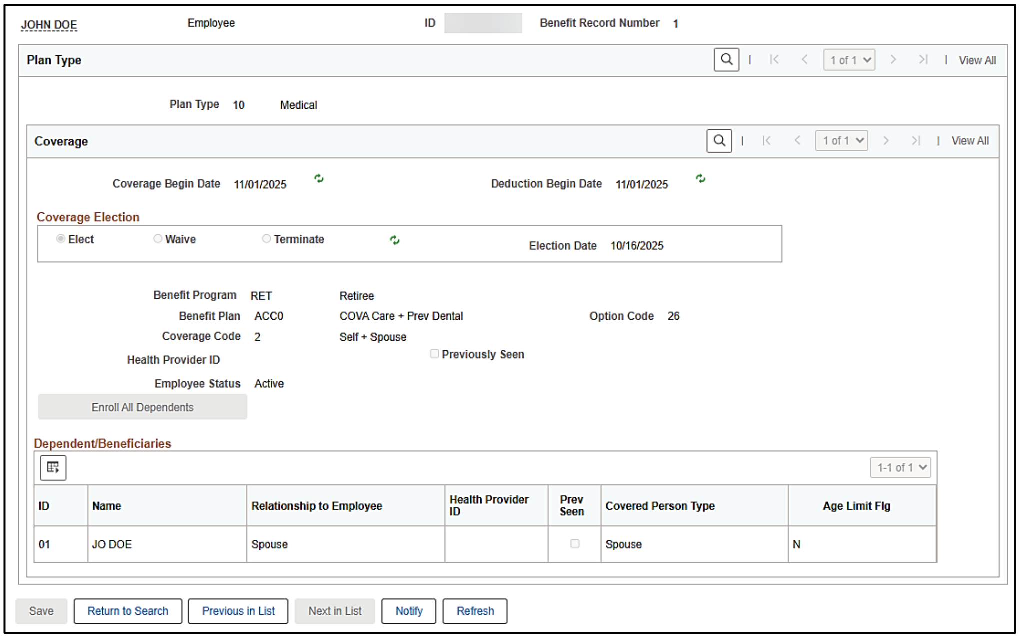
</td></tr>
<tr><td>4.</td><td>Click the Search button.



</td></tr>
</table>

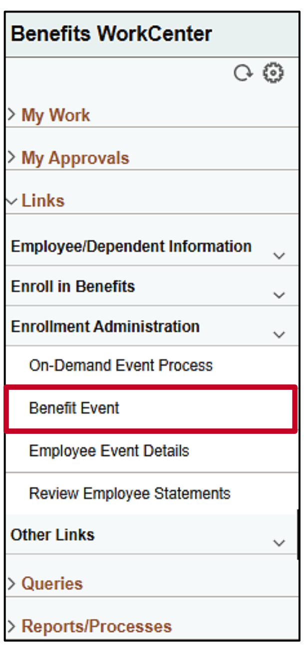
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Health Plan Enrollment** page displays.

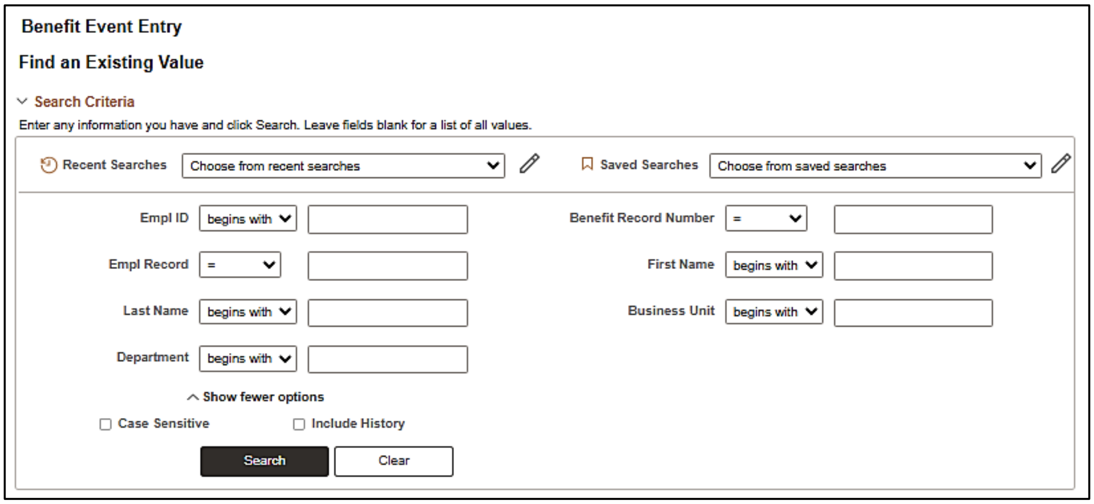
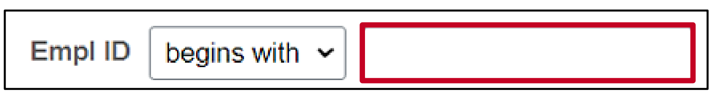
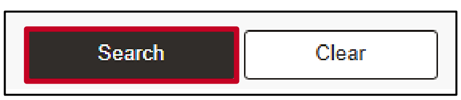


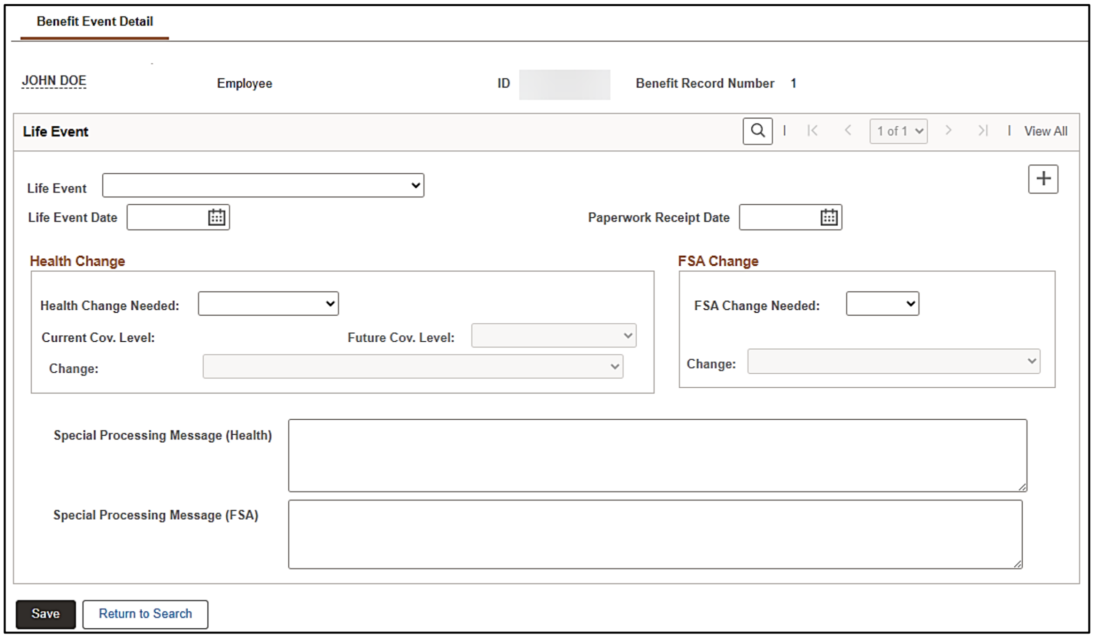
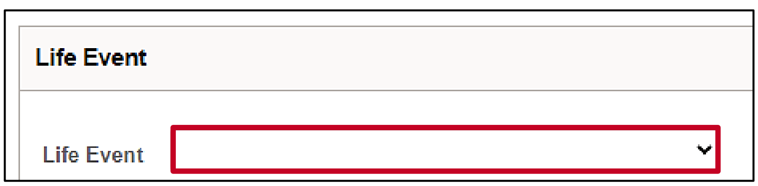
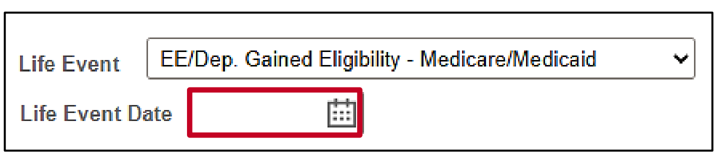
</td></tr>
<tr><td>i</td><td>In this example, the Agency BA can see that the retiree currently has a “Self + Spouse” medical coverage with their spouse covered under the current medical plan.</td></tr>
<tr><td>5.</td><td>

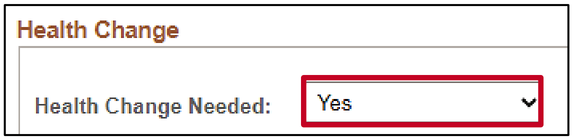
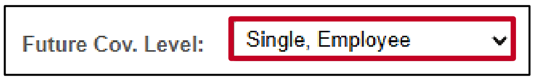
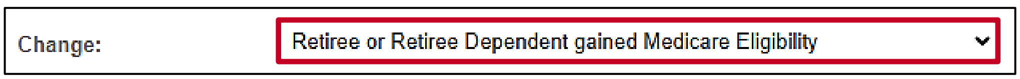
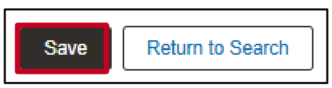
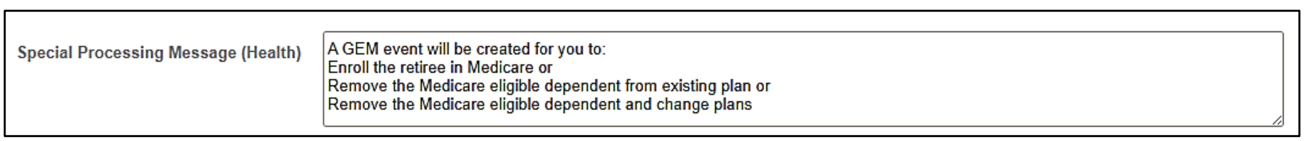
Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > Benefit Event**



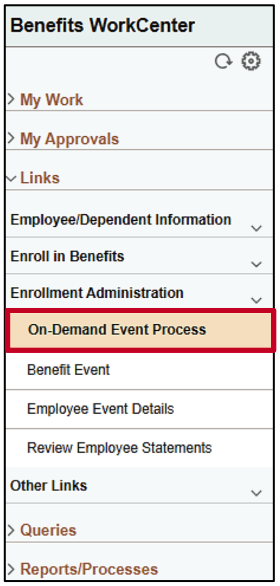
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Users can also access the Benefit Event page using the following path:
NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event</td></tr>
<tr><td colspan="2">The Benefit Event Entry Find an Existing Value Search page displays.

</td></tr>
<tr><td>6.</td><td>Enter the retiree’s Employee ID in the Empl ID field.
Note: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

</td></tr>
<tr><td>7.</td><td>Click the Search button.

</td></tr>
</table>

Step	Action
The **Benefit Event Detail** page displays.  	
8.	Click the **Life Event** dropdown button and select “EE/Dep. Gained Eligibility – Medicare/Medicaid” list item. 
9.	Enter the Effective Date in the **Life Event Date** field. **Note**: The Life Event Date is the first of the month in which the retiree is eligible for Medicare. 
10.	Enter the **Paperwork Receipt Date**. 

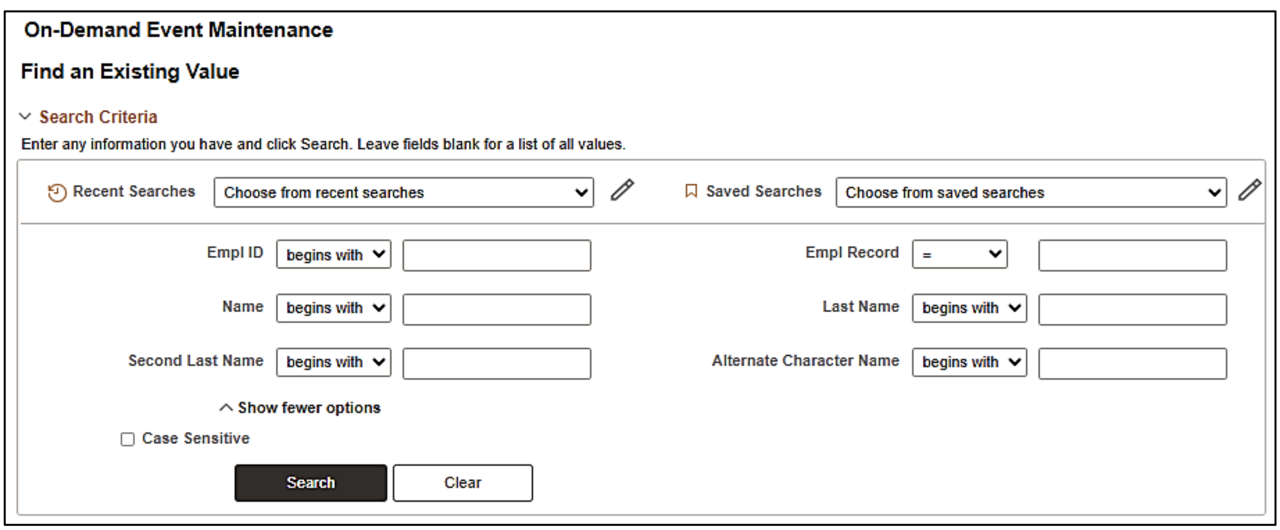
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>Click the Health Change Needed dropdown button and select “Yes”.

</td></tr>
<tr><td>12.</td><td>Click the Future Cov. Level dropdown button and select “Single, Employee”.

</td></tr>
<tr><td>13.</td><td>Click the Change dropdown button and select “Retiree or Retiree Dependent gained Medicare Eligibility”.

</td></tr>
<tr><td>14.</td><td>Click the Save button.

</td></tr>
<tr><td colspan="2">A Special Processing Message (Health) displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created.

</td></tr>
<tr><td></td><td>Now that the GEM Event has been created, the Benefit Event must be processed.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>15.</td><td>Use the following navigation path in the WorkCenter: Links > Enrollment Administration > On-Demand Event Process



</td></tr>
<tr><td></td><td>Users can also navigate to the On-Demand Event Process page using the following path:

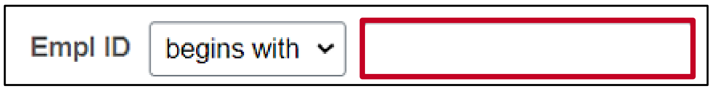
NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</td></tr>
<tr><td colspan="2">The On-Demand Event Maintenance Find an Existing Value Search page displays.

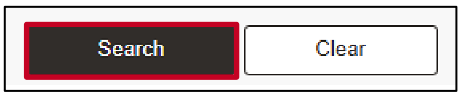


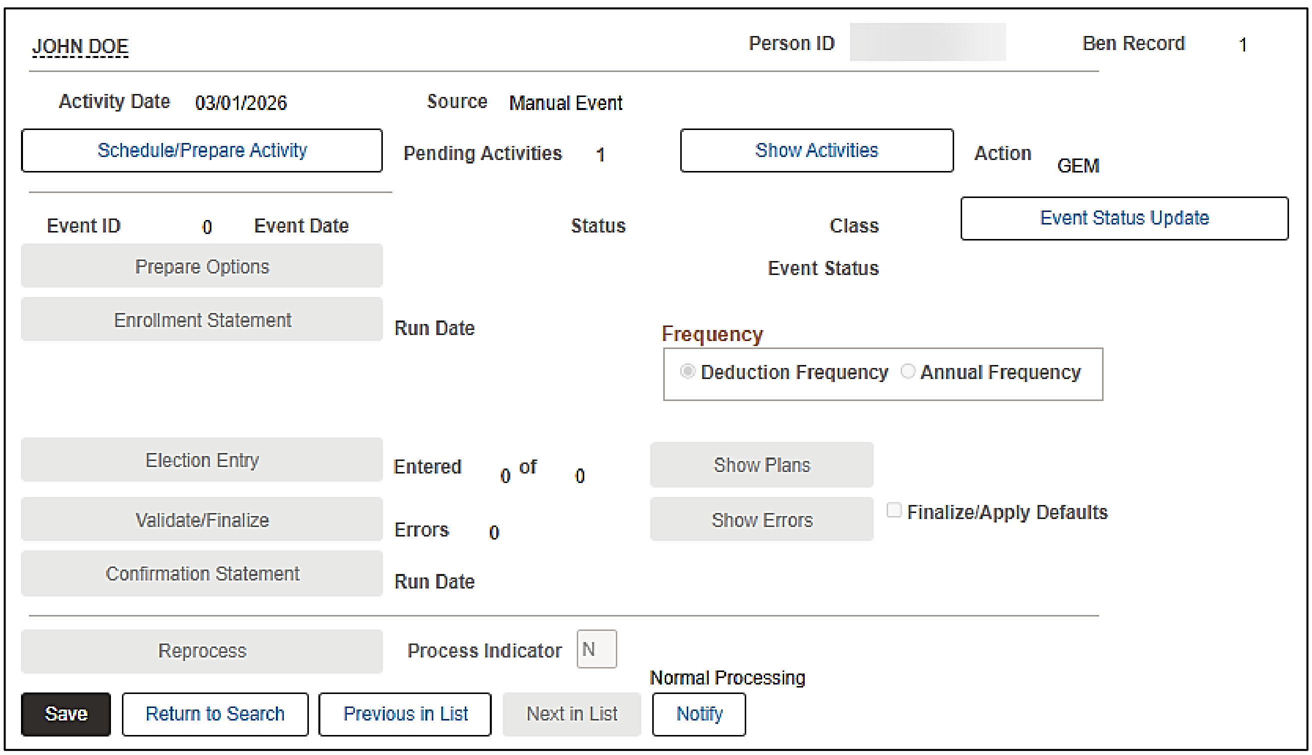
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16.</td><td>Enter the retiree’s Employee ID in the Empl ID field.

Note: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

</td></tr>
<tr><td>17.</td><td>Click the Search button.

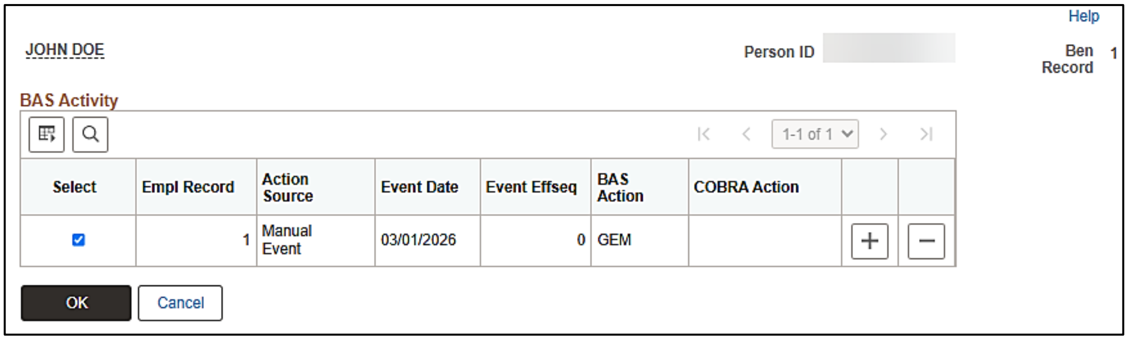
</td></tr>
<tr><td colspan="2">The On-Demand Event Process page displays.

</td></tr>
<tr><td>18.</td><td>Click the Show Activities button.

</td></tr>
</table>

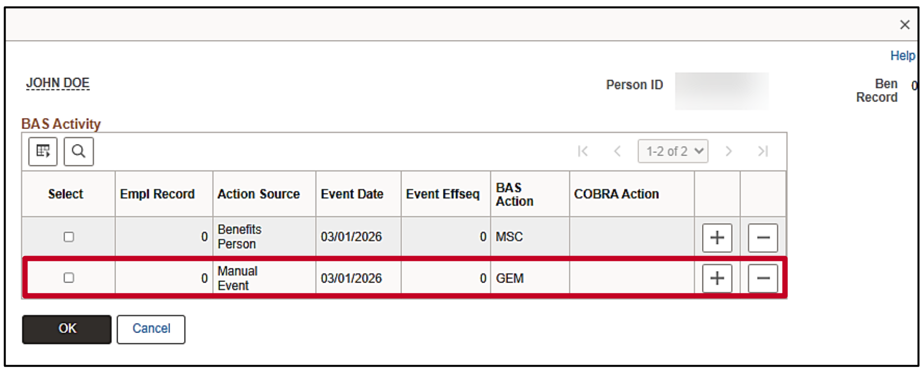
Step	Action

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

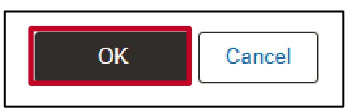


If an "MSC" BAS Action is listed, select the "GEM" BAS Action.

The "MSC" BAS Action will process automatically when the Ben Admin process runs.

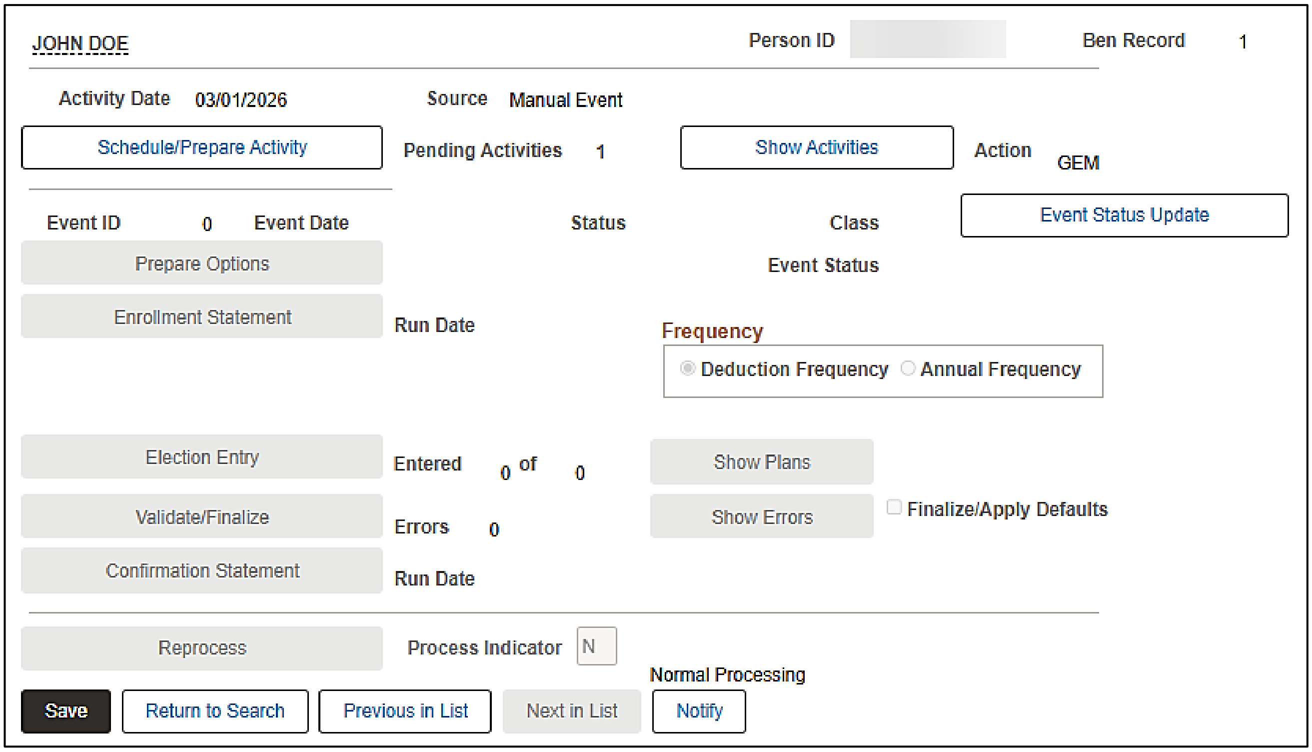


19. Click the **OK** button.

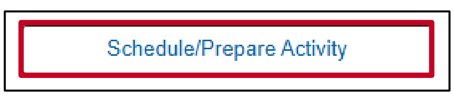


Step	Action

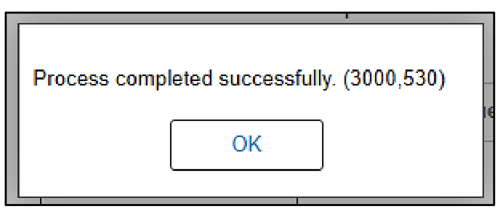
The **On-Demand Event Process** page redisplays.



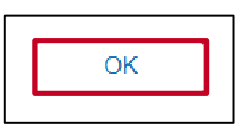
20. Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event.



A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.

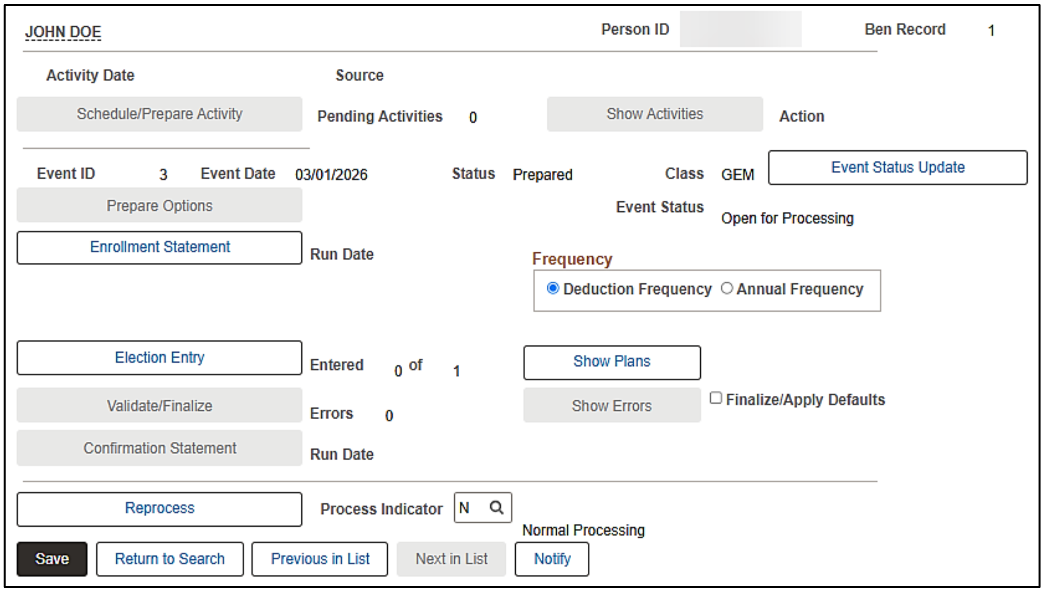


21. Click the **OK** button to close the message.



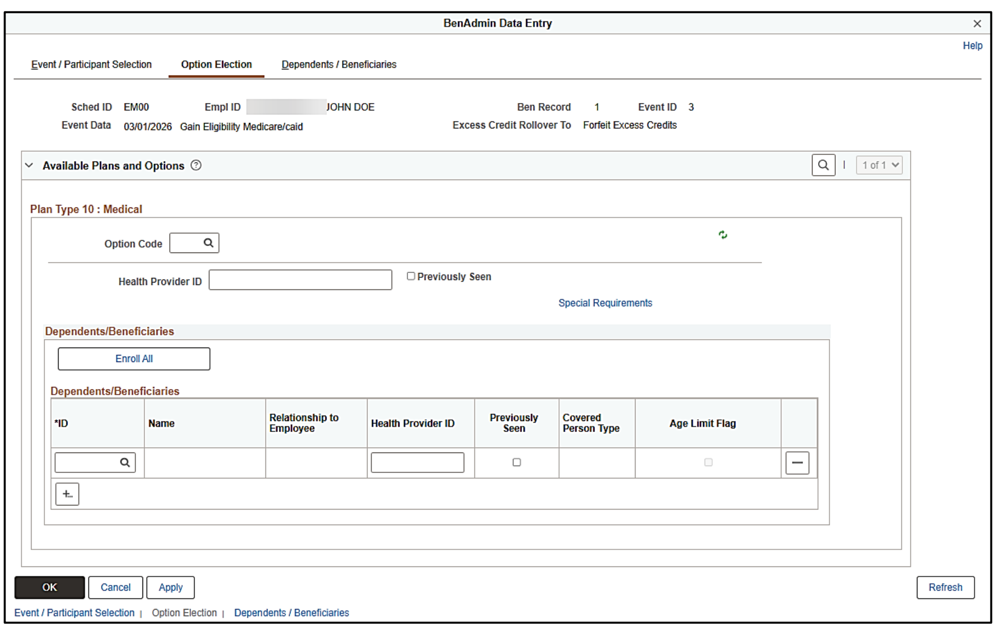
Step	Action

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

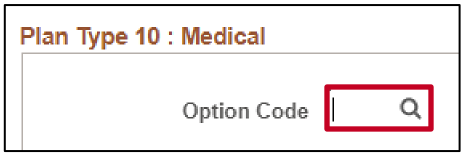


22. Click the **Election Entry** button.

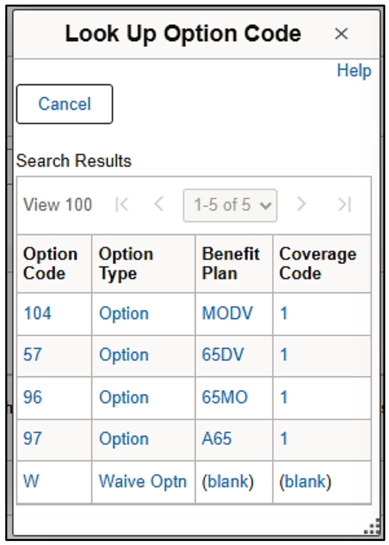
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>23.</td><td>Click the Option Code Look up icon in the Plan Type 10: Medical section.



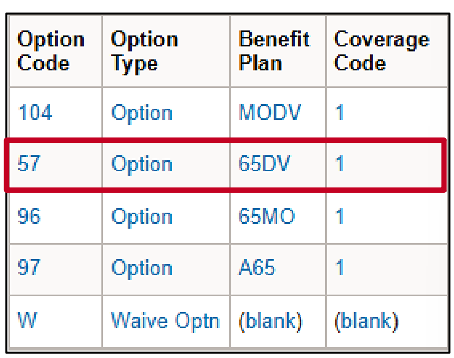
</td></tr>
<tr><td colspan="2">The Look Up Option Code page displays in a pop-up window.



</td></tr>
<tr><td></td><td>If the Over 65 Benefit Plans do not populate, ensure the Medicare information was accurately entered.

If the information is incorrect, update as needed and then complete an “Open” / “Assign Benefit Program” to the GEM Event to pick up the change.

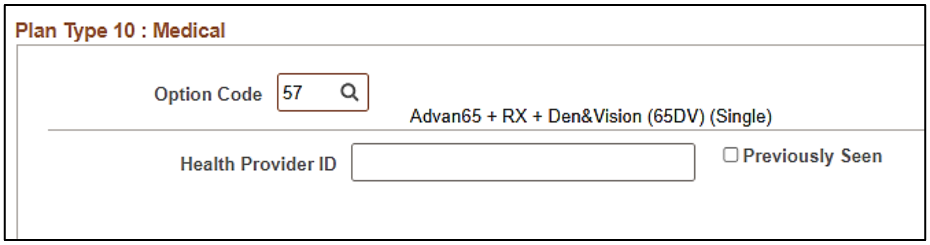
For additional information on re-opening and reprocessing Benefit Events, see the Job Aid titled BN361 Re-opening and Reprocessing a Benefit Event located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>24.</td><td>Select the applicable Option Code. In this example, Option Code “57” is selected.



</td></tr>
</table>

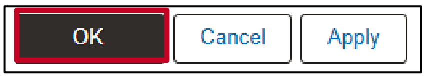
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Plan Type 10: Medical** section redisplays with the selected Option Code displayed.



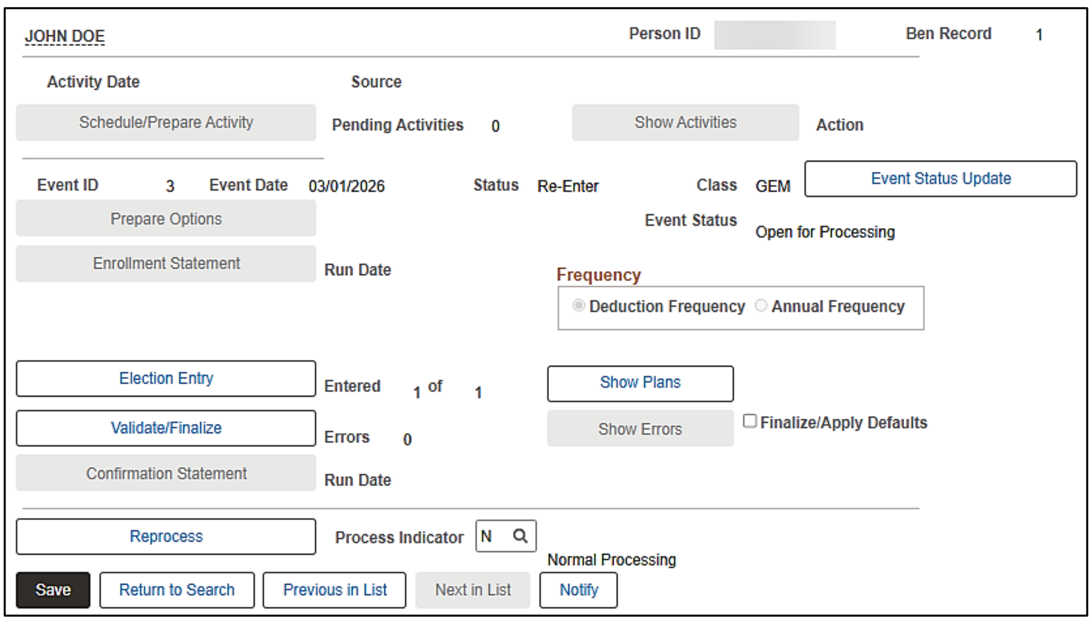
</td></tr>
<tr><td>25.</td><td>

Click the **OK** button.



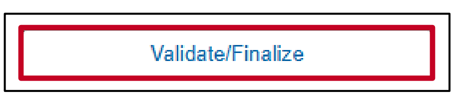
</td></tr>
<tr><td colspan="2">

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

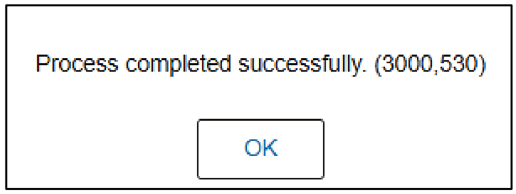
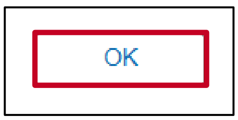


</td></tr>
<tr><td>26.</td><td>

Click the **Validate/Finalize** button.



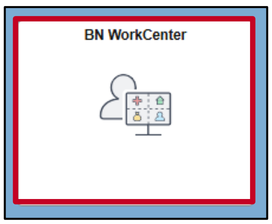
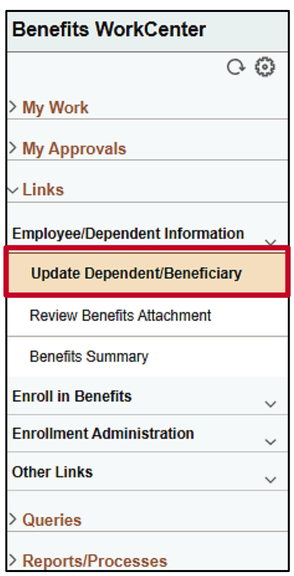
</td></tr>
</table>

Step	Action
A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	
27.	Click the **OK** button to close the message. 

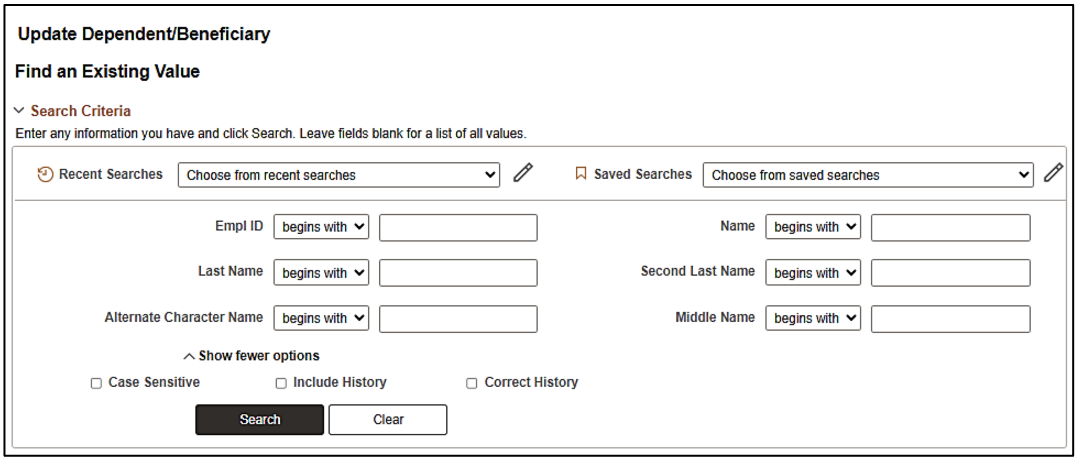
Hire the Dependent as an Employee

Before hiring the dependent as an employee, the Agency BA must gather the personal information (e.g., Social Security number, date of birth) from the **Update Dependent/Beneficiary** page. The information on this page must be confirmed with the dependent. Once the information is gathered, the Agency BA can complete the hire process. In this example, the spouse is being hired as an employee.

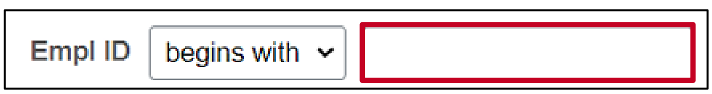
Note: If the retiree was previously on a Family plan, the youngest dependent would be hired as an employee.

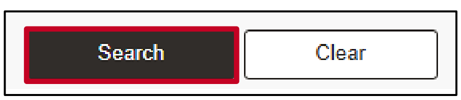
Step	Action
1.	Navigate to the **Update Dependent/Beneficiary** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **Links > Employee/Dependent Information > Update Dependent/Beneficiary** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Update Dependent/Beneficiary** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Update Dependent/Beneficiary Find an Existing Value Search page displays.

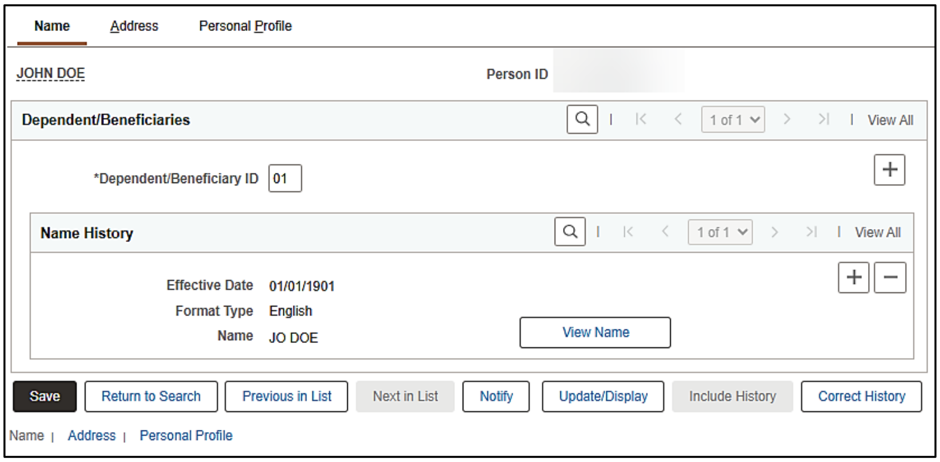

</td></tr>
<tr><td></td><td>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>3.</td><td>Enter the retiree’s Employee ID in the Empl ID field.

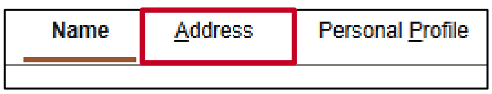
Note: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

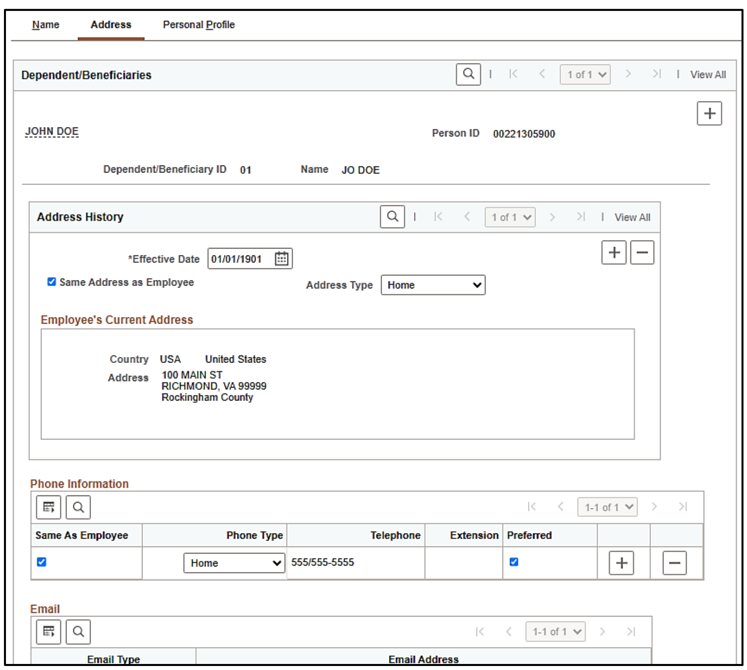

</td></tr>
<tr><td>4.</td><td>Click the Search button.

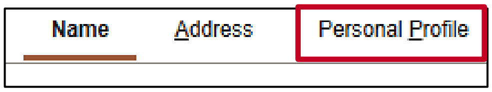
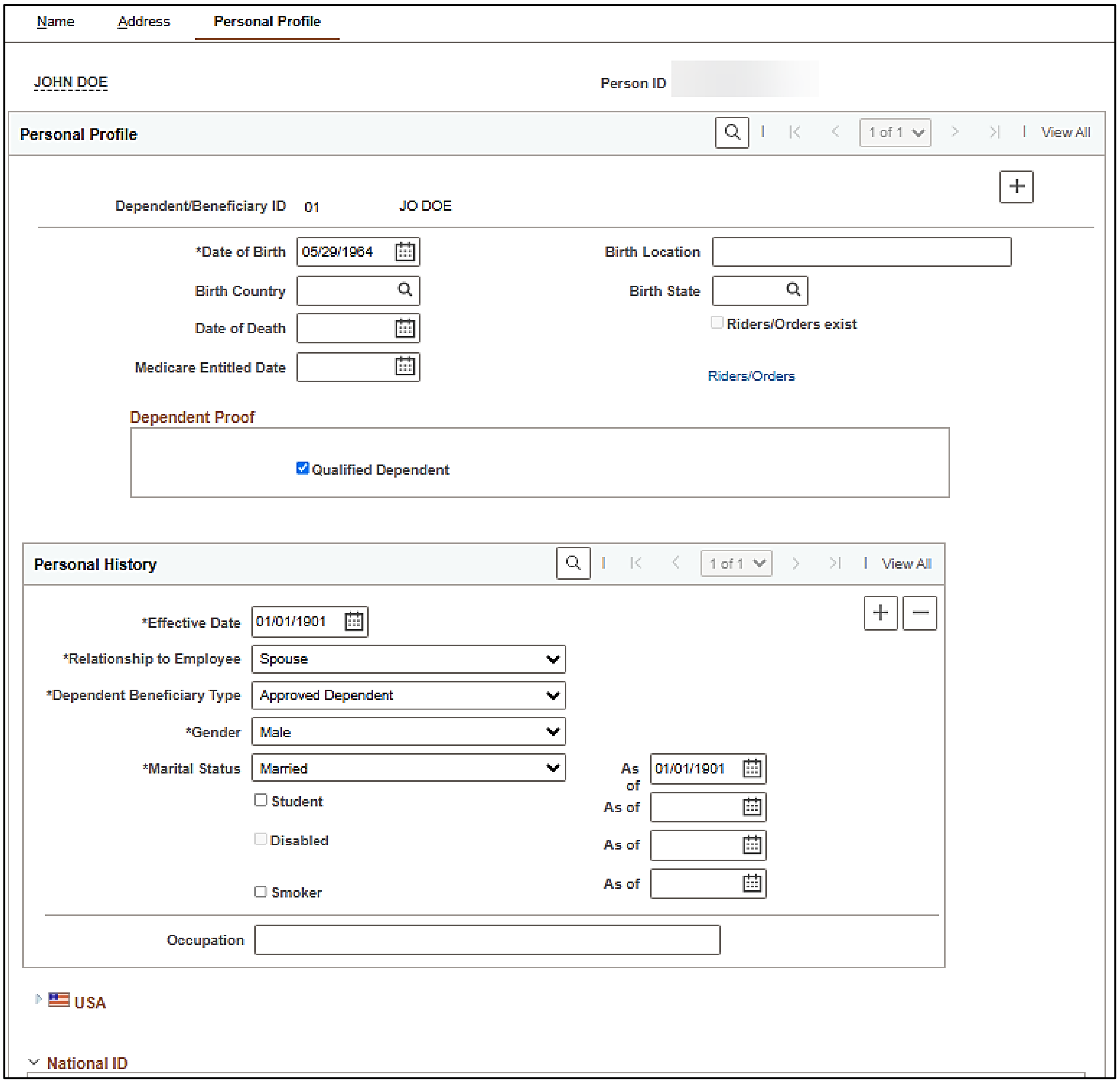

</td></tr>
</table>

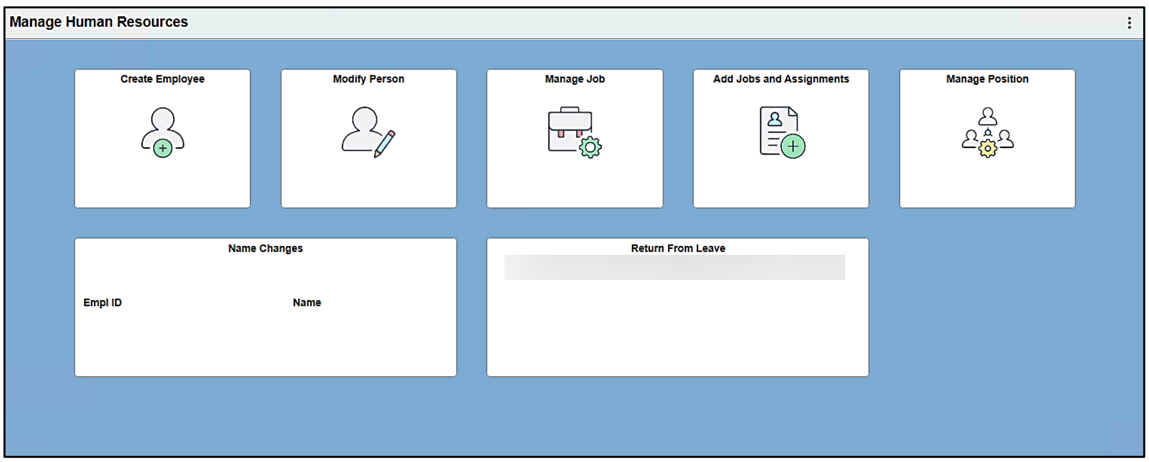
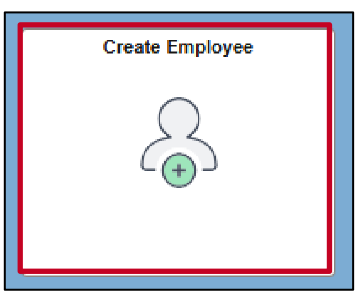
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Update Dependent/Beneficiary page displays for the selected retiree with the Name tab displayed by default.

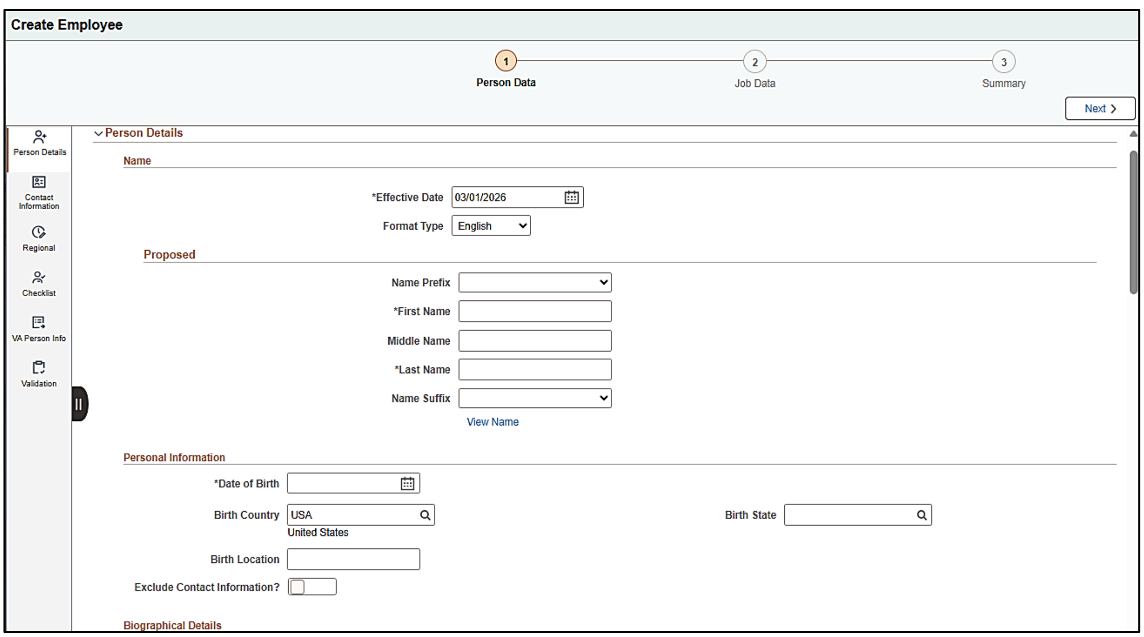
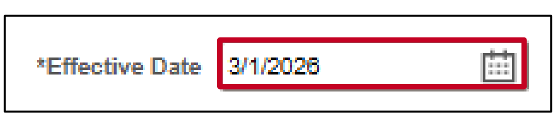

</td></tr>
<tr><td>5.</td><td>Click the Address tab to review the Address information for the dependent.

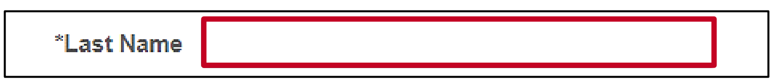
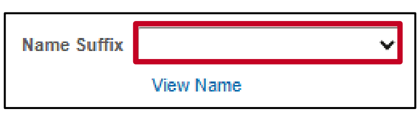
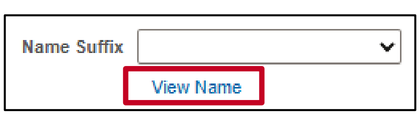

</td></tr>
<tr><td colspan="2">The Address page displays.

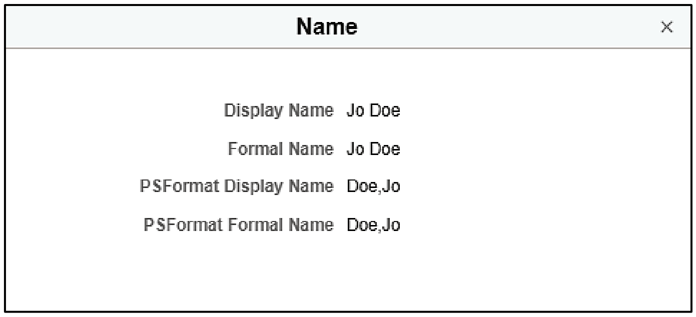
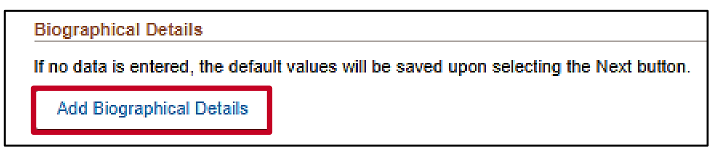
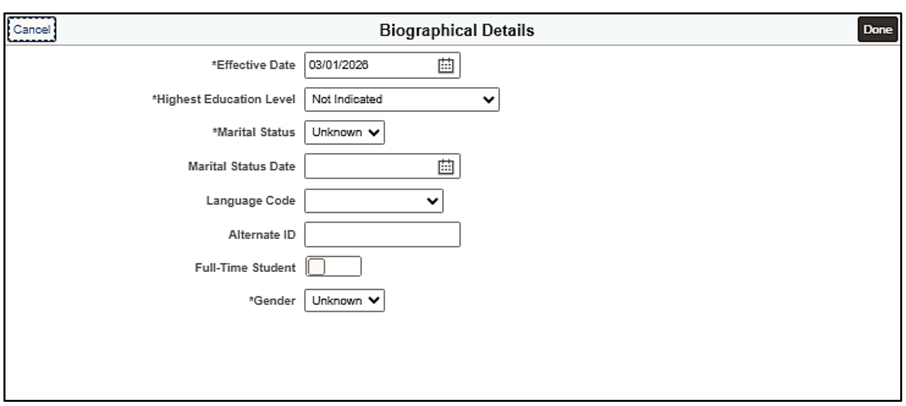

</td></tr>
<tr><td>6.</td><td>Confirm that the information on this page is accurate for the dependent.</td></tr>
</table>

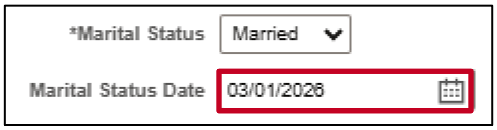
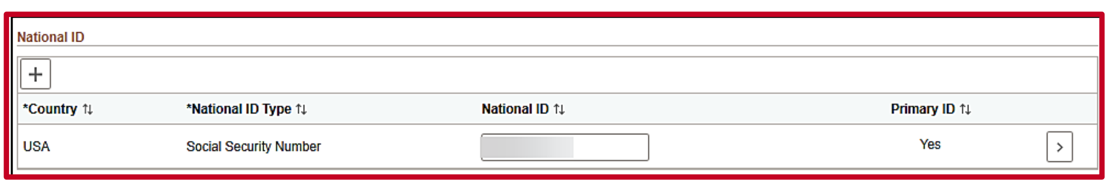
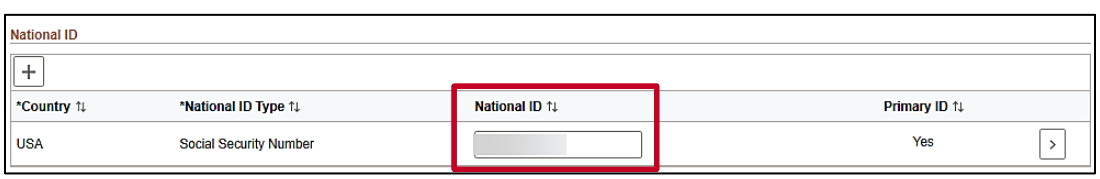
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Click the Personal Profile tab.

</td></tr>
<tr><td colspan="2">The Personal Profile page displays.

</td></tr>
<tr><td>8.</td><td>Confirm that the information on this page is accurate for the dependent.
Note: This information will be used to hire the dependent as an employee.</td></tr>
</table>

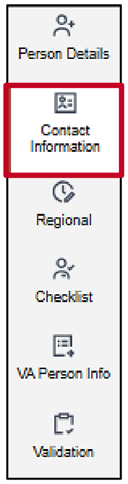
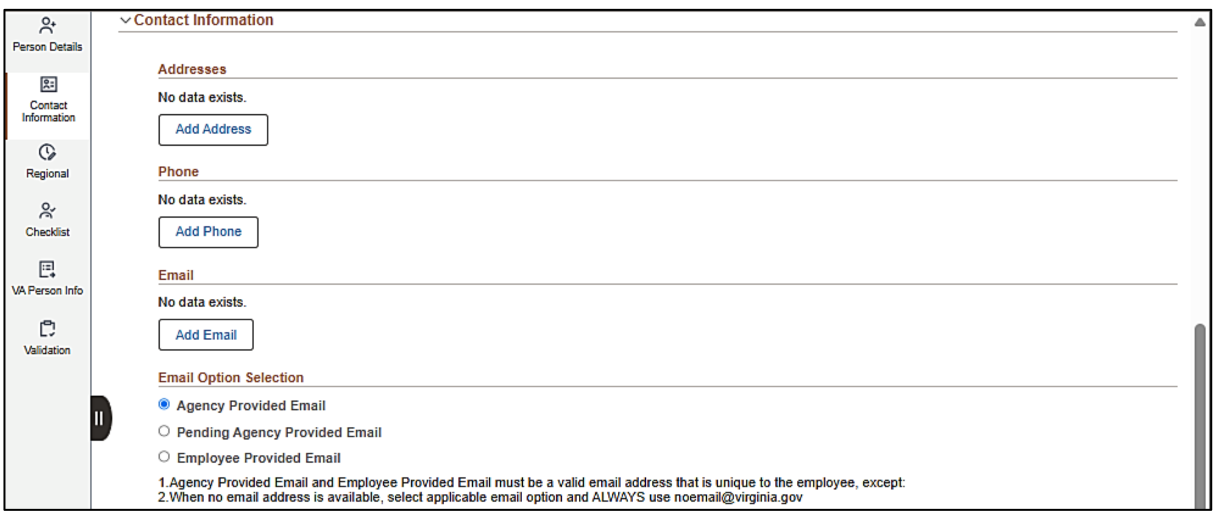
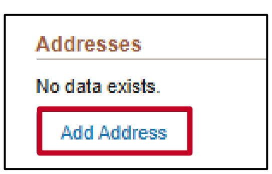
Step	Action
9.	Navigate to the **Create Employee** page by clicking the **Manage Human Resources** tile on the **Cardinal HCM Homepage**. 
The **Manage Human Resources** page displays.  	
10.	Click the **Create Employee** tile. 

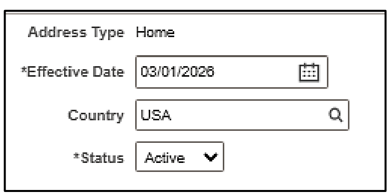
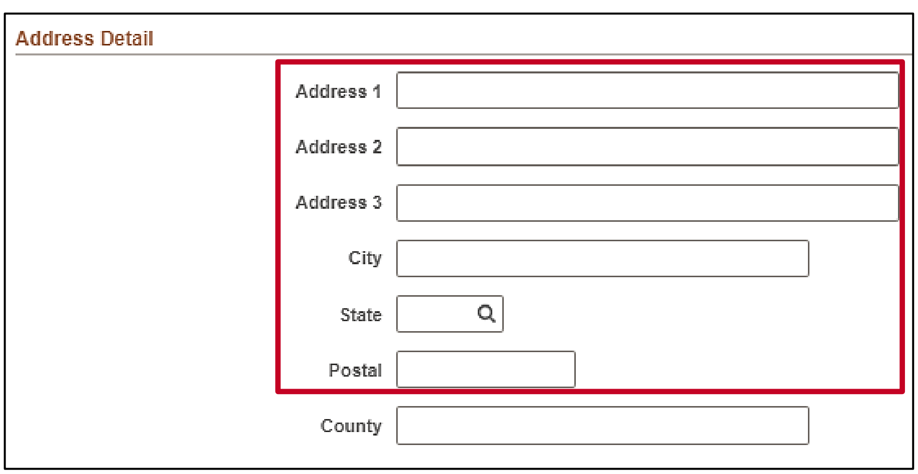
Step	Action
	The **Create Employee Search** page displays. 
11.	Enter the dependent's SSN in the **National ID** field. 
12.	Click the **Search** button. 
	The **Create Employee** page displays with the **Person Details** tab (**Step 1 of 3: Person Data**) displayed by default. 
13.	The **Effective Date** field defaults to today's date. Update this date to the applicable date of the new hire (dependent) as needed. 

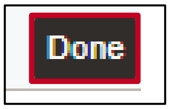
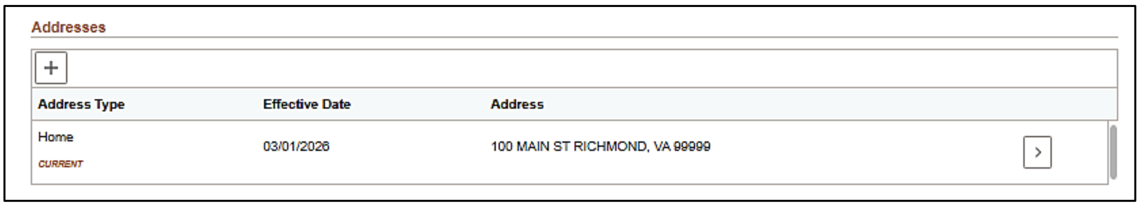
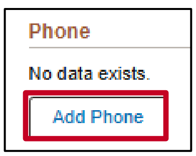
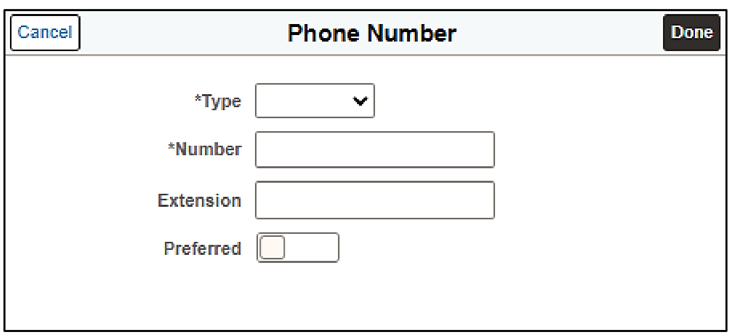
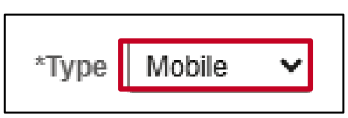
Step	Action
	The **Effective Date** cannot be greater than today's date when creating or modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
14.	Optionally, click the **Name Prefix** dropdown button and select the applicable prefix. 
15.	Enter the dependent's first name in the **First Name** field (required). 
16.	Optionally, enter the dependent's middle name or middle initial in the **Middle Name** field. 
	Do not add a period behind the middle initial.
17.	Enter the dependent's last name in the **Last Name** field (required). 
	Do not include suffixes (Jr, Sr, or IV) in the **Last Name** field.
18.	Click the **Name Suffix** dropdown button and select the applicable suffix as needed. 
19.	Optionally, click the **View Name** link to view how the name will be displayed. 

Step	Action
	The **Name** page displays in a pop-up window. **Note**: After reviewing, click the “**X**” button to close the pop-up window and adjust the name fields if needed. 
20.	Scroll down to the **Personal Information** section and click the **Date of Birth Calendar** icon to select the dependent’s date of birth (required). **Note**: The **Birth Country** field defaults to “USA”. This can be updated but is not required as this data is not reported. 
21.	Click the **Add Biographical Details** button. 
	The **Biographical Details** page displays in a pop-up window. 

Step	Action
	The **Effective Date** field within this section defaults to the effective date selected above. Do not change.
22.	Click the **Marital Status** dropdown button and select the dependent's legal marital status. 
	When a selection is made in the **Marital Status** field, the Marital Status Date updates to the Effective Date above. Do not change. 
23.	The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
24.	Click the **Gender** dropdown button and select the dependent's gender. **Note**: This field is a required field for benefits and payroll purposes and must provide the dependent's legal gender. This is not to be confused with the optional **Preferred Gender** field located on the **VA Person** Info section. 
25.	Click the **Done** button. 
26.	Scroll down to the **National ID** section. 
	The **National ID** field auto-populates. 

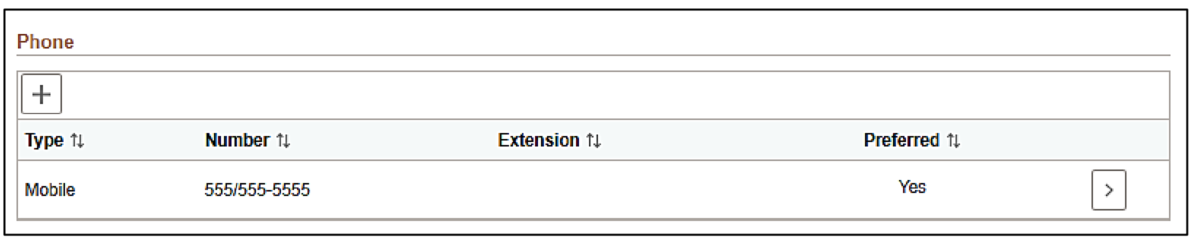
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>27.</td><td>Click the Contact Information tab or use the scroll bar to scroll to the Contact Information section.

</td></tr>
<tr><td colspan="2">The Contact Information section displays.

</td></tr>
<tr><td>28.</td><td>Click the Add Address button in the Addresses section.

</td></tr>
</table>

Step	Action
The **Add Address** page displays in a pop-up window. 	
	The top section of the **Add Address** page auto-populates. Do not change. An **Address Type** of “Home” is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information. 
29.	Enter the dependent’s address information using the applicable fields in the **Address Detail** section. 

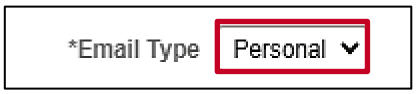
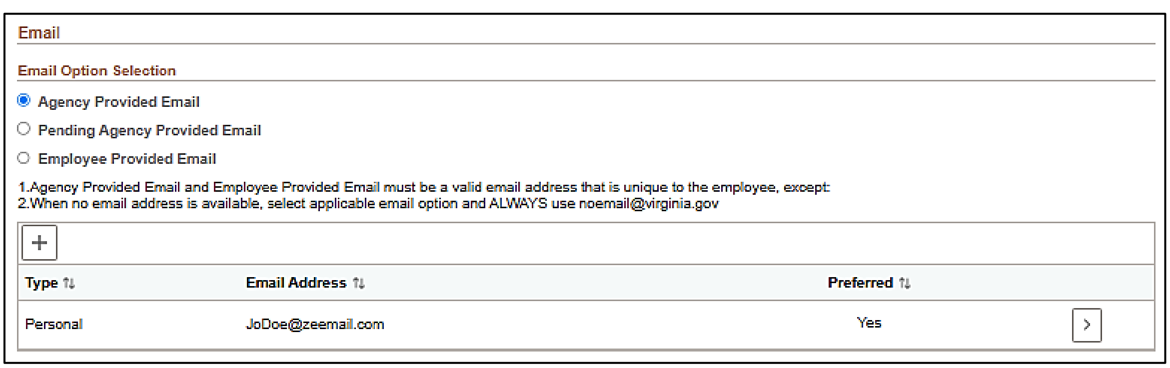
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>The Address 1, City, State, and Postal are required fields. The employee’s personal data cannot be saved if any of these fields are blank.</td></tr>
<tr><td>30.</td><td>Click the Done button once the applicable Address Detail information has been entered.

</td></tr>
<tr><td colspan="2">The Addresses section redisplays.

</td></tr>
<tr><td>31.</td><td>Click the Add Phone button in the Phone section.

</td></tr>
<tr><td colspan="2">The Phone Number page displays in a pop-up window.

</td></tr>
<tr><td>32.</td><td>Click the Type dropdown button and select the type of phone number being entered.

</td></tr>
</table>

Step	Action
33.	Enter the dependent's phone number in the **Number** field. 
	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.
34.	Select the **Preferred** field toggle to identify the dependent's preferred phone number. 
35.	Click the **Done** button once the Phone Number information has been entered. 

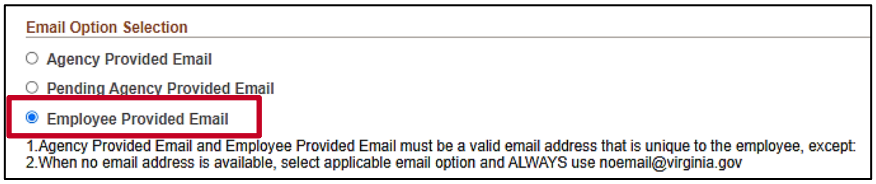
The **Phone** section redisplays.



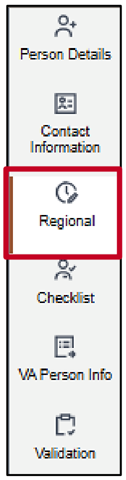
Step	Action
	Additional phone numbers can be added for the dependent as needed by clicking the **Add** button (**+**) and then repeating **Steps 31-35**. 
36.	Click the **Add Email** button in the **Email** section. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Email Address page displays in a pop-up window.
</td></tr>
<tr><td>37.</td><td>Click the Email Type dropdown button and select “Personal”.
</td></tr>
<tr><td>38.</td><td>Enter the email address in the Email Address field.
</td></tr>
<tr><td></td><td>When no email address is available, use noemail@virginia.gov. This can be replaced with a personal email address once it is obtained.
The personal email address for the dependent must be unique and cannot be the same as the retiree’s email address. The system will display an error upon validation if a duplicate email address is entered.</td></tr>
<tr><td>39.</td><td>Click the Done button.
</td></tr>
<tr><td colspan="2">The Email section redisplays.
</td></tr>
</table>

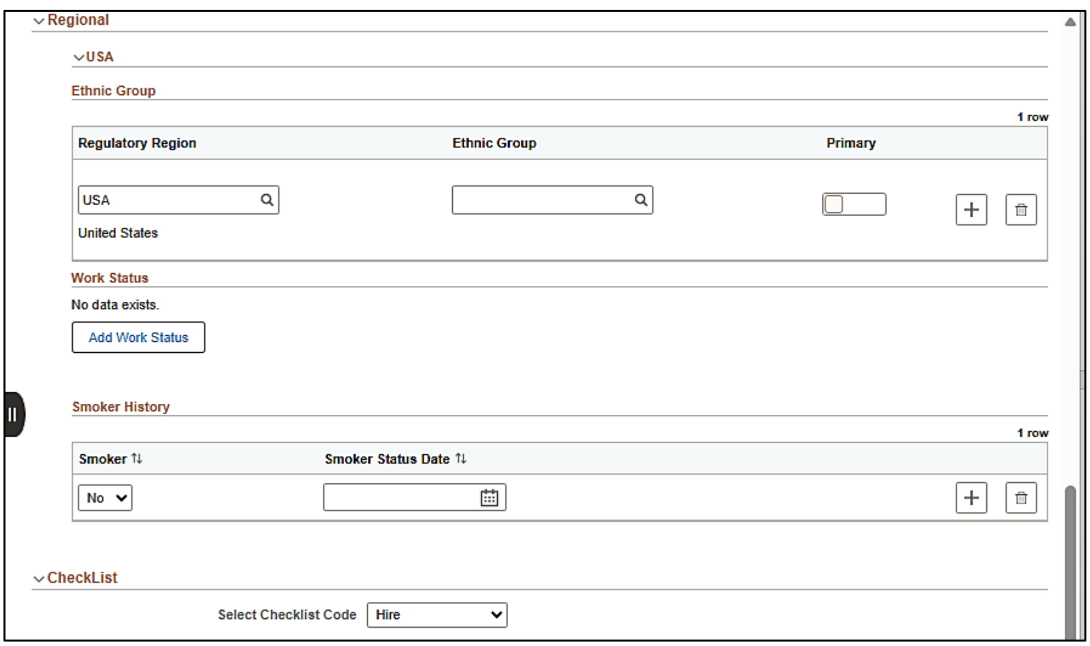
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>40.</td><td>Select the Employee Provided Email radio button option in the Email Option Selection section.



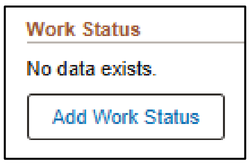
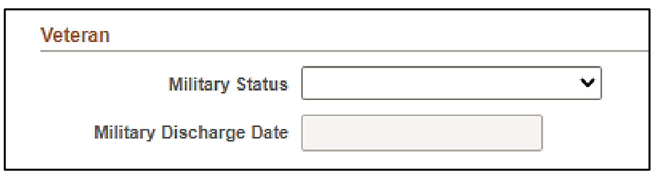
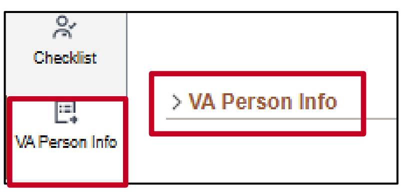
</td></tr>
<tr><td>41.</td><td>Click the Regional tab.



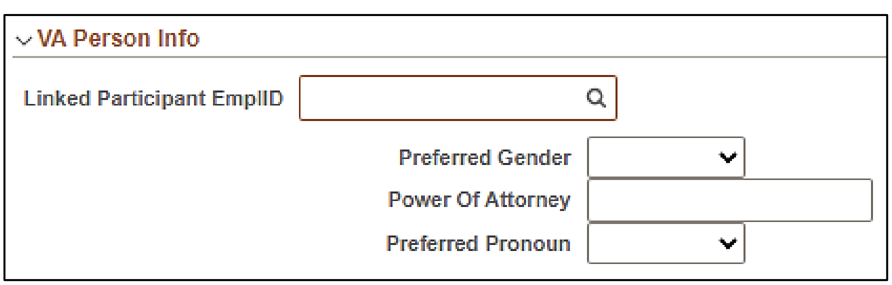
</td></tr>
<tr><td colspan="2">The Regional section displays.

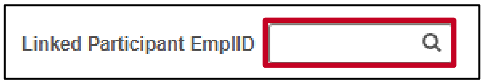
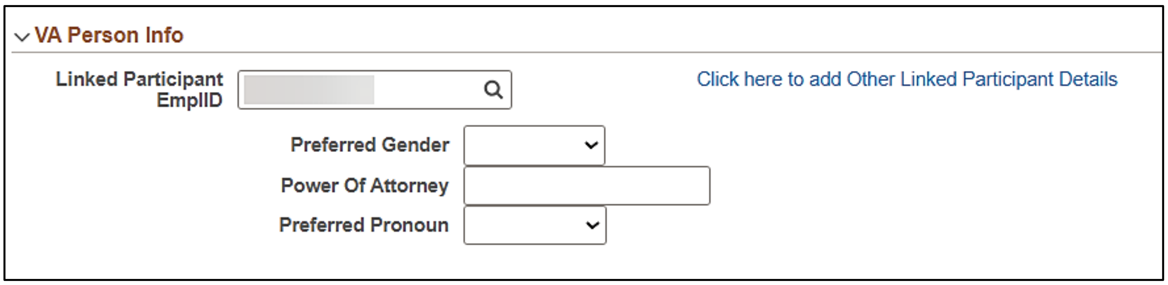
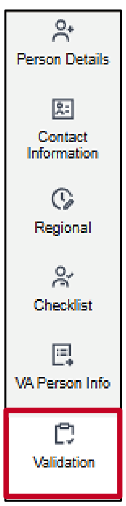


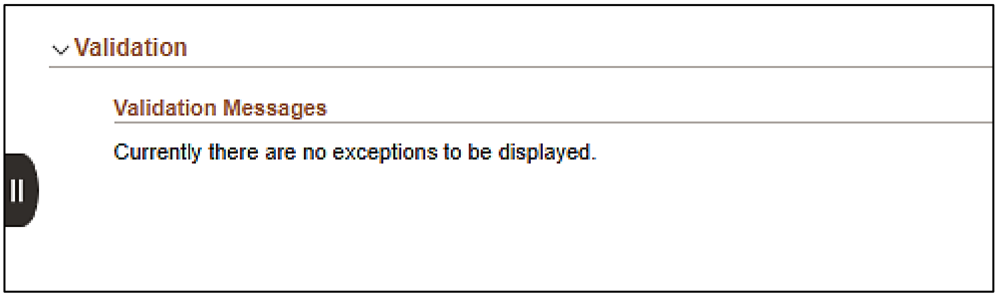
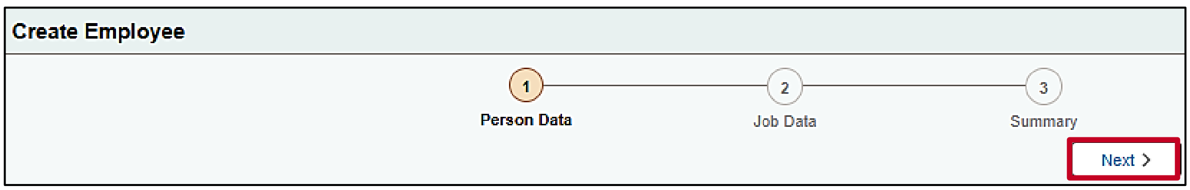
</td></tr>
</table>

Step	Action
	The information in the **Regional** section is used for reporting purposes and should be entered if provided. The **Regulatory Region** field defaults to “USA”. Do not change. The **Ethnic Group** field is optional but can be entered if provided by the dependent. It may also be filled out by the dependent in Employee Self-Service.
42.	Click the **Add Work Status** button in the **Work Status** section. 
	The **Veteran** section is also optional and can be entered if the dependent provided their military service and service documentation. 
43.	Click the **Done** button. 
44.	Click the **VA Person Info** tab and click the **Expand** button to view the **VA Person Info** section. 

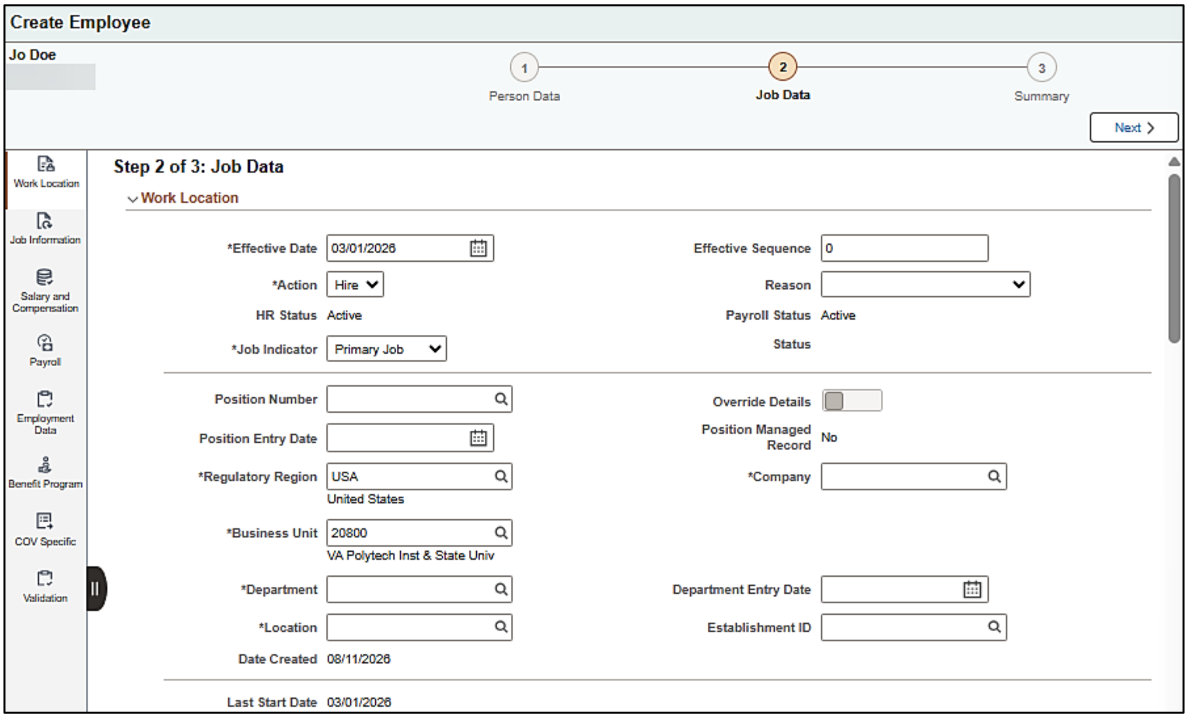
The **VA Person Info** section displays.



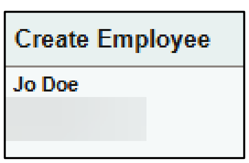
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>45.</td><td>Enter the Employee ID of the employee (the retiree in this scenario) to be linked to the dependent in the Linked Participant EmplID field and tab out of the field.

</td></tr>
<tr><td colspan="2">The VA Person Info page redisplays with the Click here to add Other Linked Participant Details link displayed.

</td></tr>
<tr><td>ℹ</td><td>If more than one dependent needs to be linked, refer to the Job Aid titled BN361 Linking Dependents and Retirees, located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>46.</td><td>Click the Validation tab.

</td></tr>
</table>

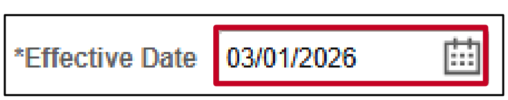
Step	Action
The **Validation** section displays.  	
47.	Click the **Next** button on the right side of the page at the top. 
	This is the step where information entered for the employee’s Personal Data is validated. If there is any missing required information, Cardinal will generate an alert. **Note:** Do not click the **Back** button in the browser to go back, as all information that has been entered will be lost. Review the message and go to the sections where the missing information is captured and enter the required information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Create Employee (Step 2 of 3: Job Data) page displays with the Work Location tab displayed by default.


</td></tr>
<tr><td>48.</td><td>Cardinal will auto-assign the Employee ID Number for the dependent. Make note of the assigned Employee ID Number for future use.

Note: This number is located at the top of the page below the dependent's name.


</td></tr>
<tr><td>49.</td><td>The Effective Date field defaults to the date entered on the Personal Information page. Update to the first of the month of eligibility.

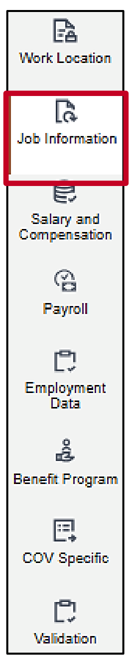

</td></tr>
<tr><td></td><td>The Action field defaults to “Hire” and no other selections are available.


</td></tr>
</table>

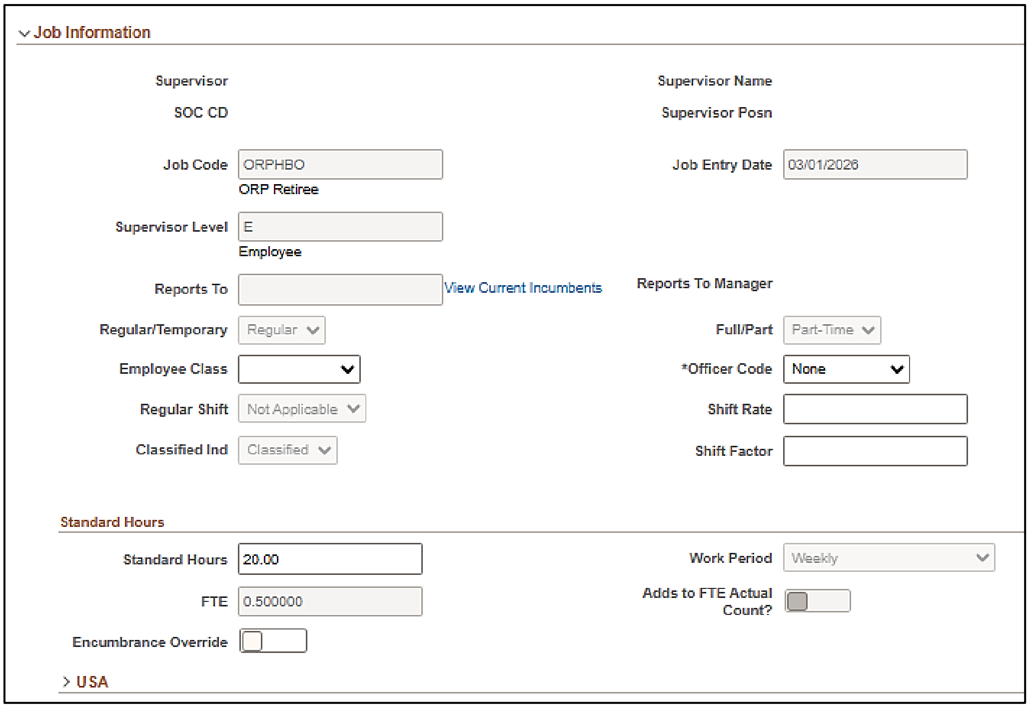
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>50.</td><td>Click the Reason dropdown button and select the applicable retiree type. In this example, “Hire ORP Ret” has been selected.

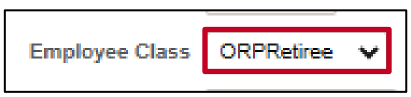
</td></tr>
<tr><td></td><td>Users may see a notification message displayed in a pop-up window. In this case, review the message, confirm the effective date is correct, and then click the OK button.

</td></tr>
<tr><td>51.</td><td>Enter the retiree Position Number in the Position Number field (“Company Code + Retiree Type + 00”).
In this example, “VPIORP00” has been selected.

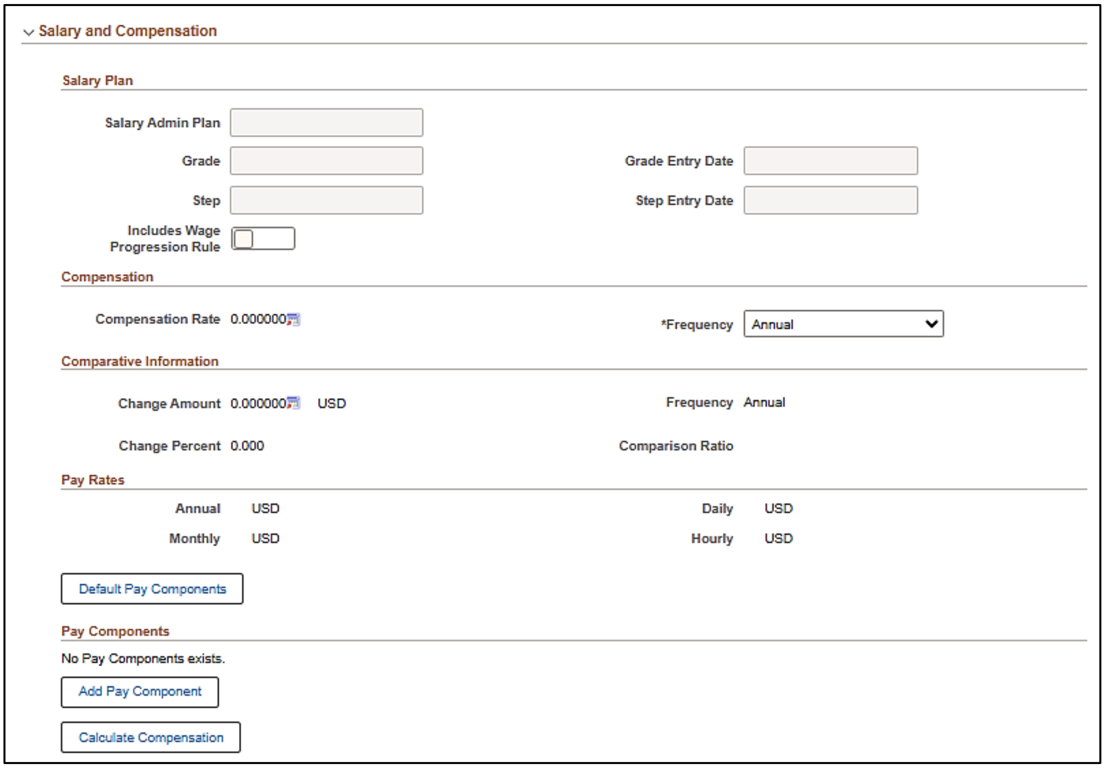
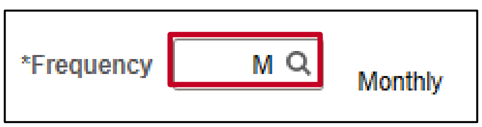
</td></tr>
<tr><td></td><td>The remaining position related fields on this page will auto-populate once the Position Number is entered and tab out of the Position Number field.</td></tr>
<tr><td>52.</td><td>Click the Job Information tab.

</td></tr>
</table>

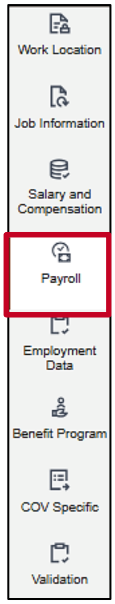
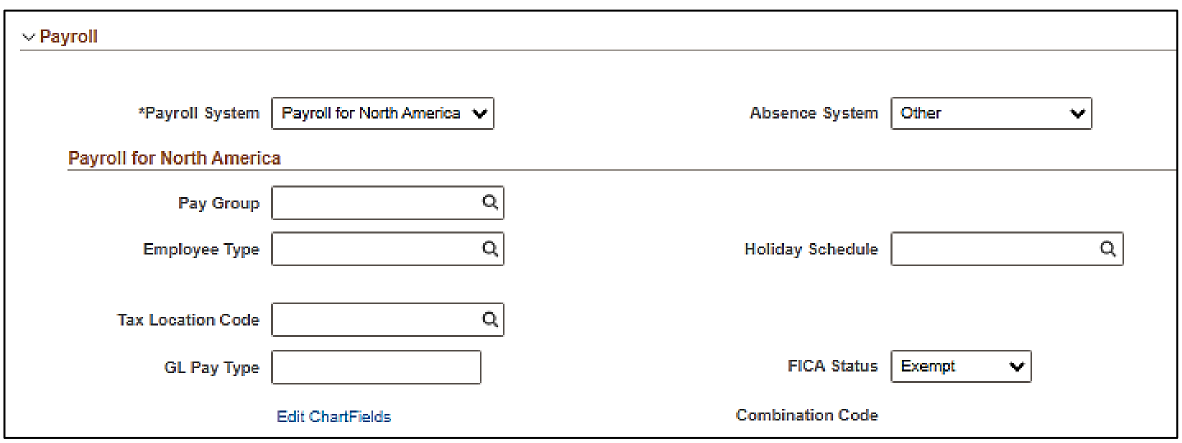
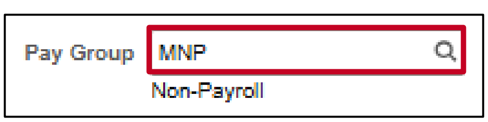
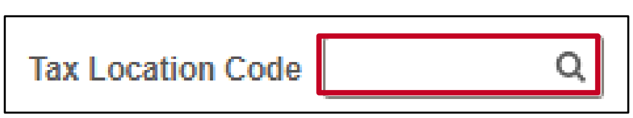
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Job Information section displays.


</td></tr>
<tr><td>53.</td><td>Click the Employee Class dropdown button and select the applicable Employee Class. In this example “ORPRetiree” has been selected.


</td></tr>
<tr><td>54.</td><td>Click the Salary and Compensation tab.

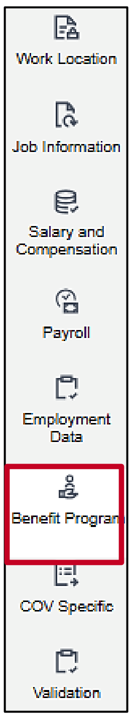

</td></tr>
</table>

Step	Action
	The **Salary and Compensation** section displays. 
55.	Click the **Frequency Look up** icon and select "M" (Monthly). 
56.	Click the **Default Pay Components** button. 
57.	Click the **Calculate Compensation** button. 

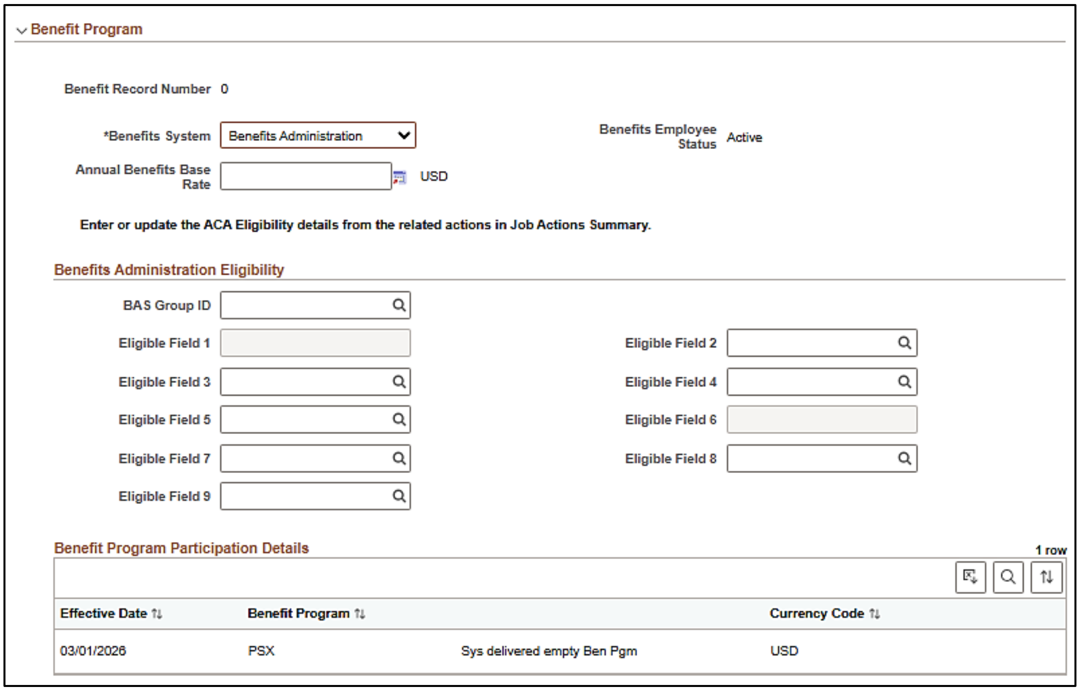
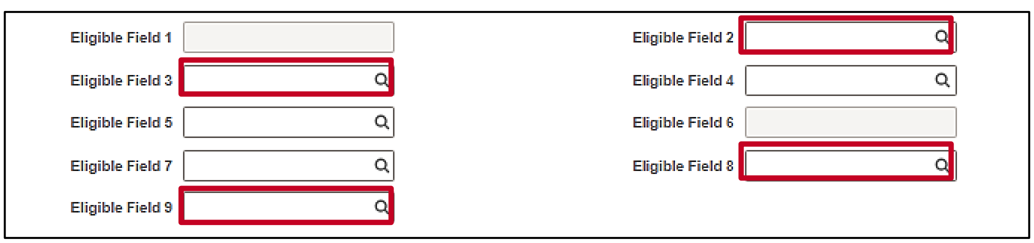
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>58.</td><td>Click the Payroll tab.

</td></tr>
<tr><td colspan="2">The Payroll section displays.

</td></tr>
<tr><td>59.</td><td>Click the Pay Group Look up icon and select “MNP” (Non-Payroll).

</td></tr>
<tr><td>60.</td><td>Enter the applicable Tax Location Code in the Tax Location Code field.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Other fields in the Payroll for North America section auto-populate based upon the selected Pay Group. Do not change.

</td></tr>
<tr><td>61.</td><td>Click the Benefit Program tab.

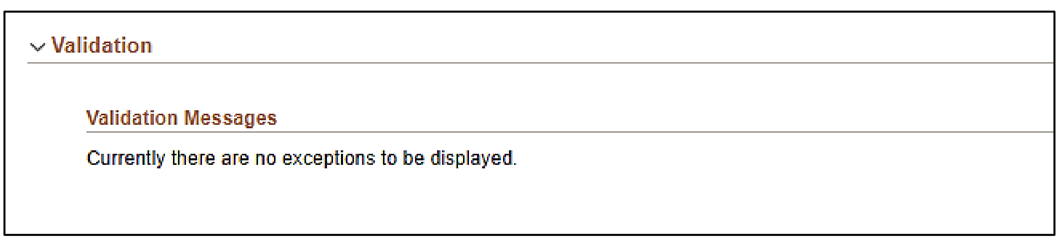


</td></tr>
</table>

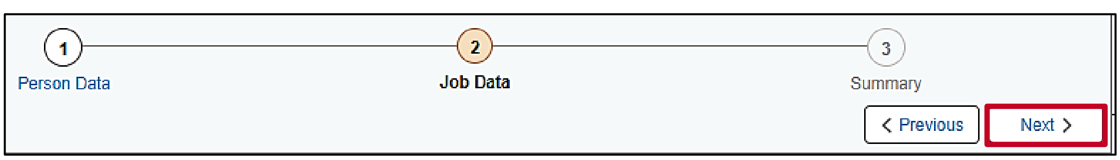
Step	Action
The **Benefit Program** section displays. 	
62.	Scroll down to the **Benefits Administration Eligibility** section and complete the following fields: • **Eligible Field 2** (e.g., “007008000” for ORP) • **Eligible Field 3** (“N”) • **Eligible Field 8** (“12-12”) • **Eligible Field 9** (e.g., “LS-GB”) 
ℹ	For more information pertaining to Eligible Fields, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields** located on the Cardinal website in **Job Aids** under **Learning**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>63.</td><td>Click the Validation tab.

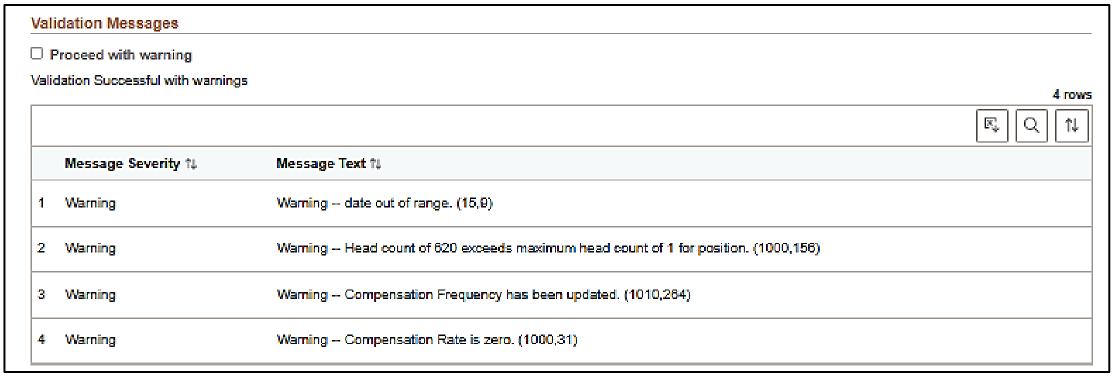
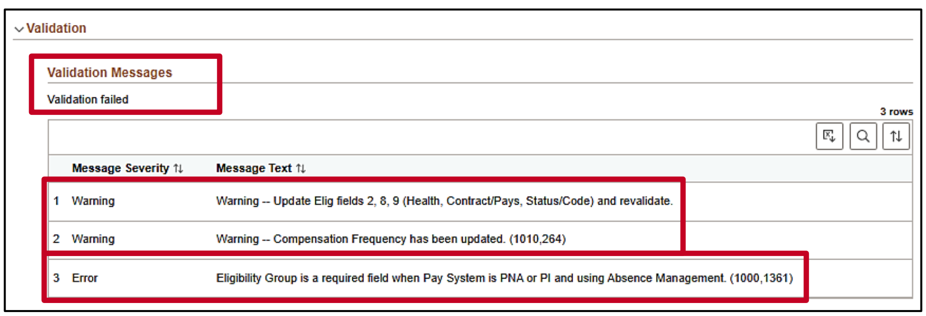
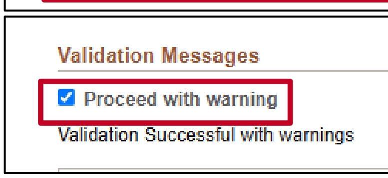
</td></tr>
<tr><td colspan="2">The Validation section displays.

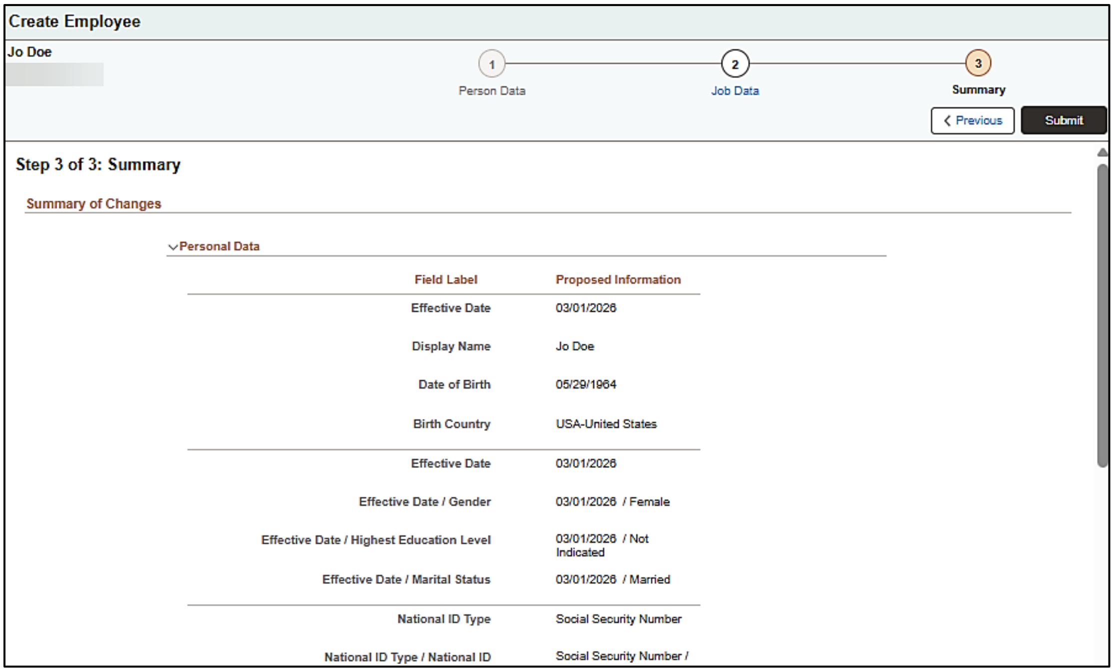
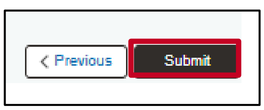
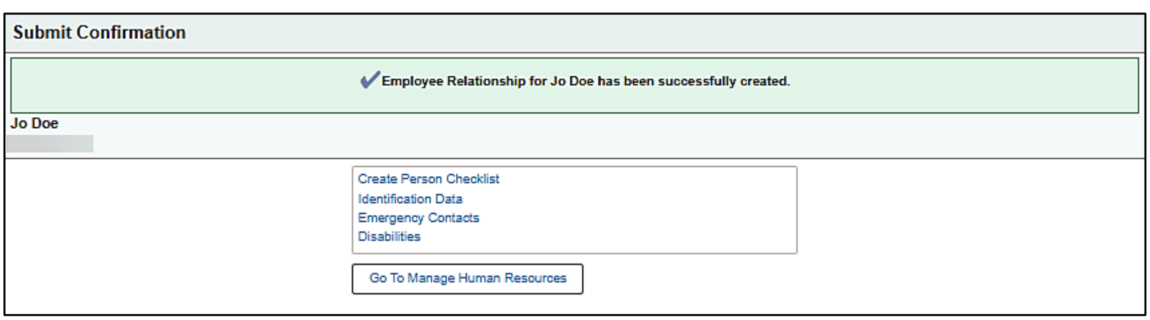


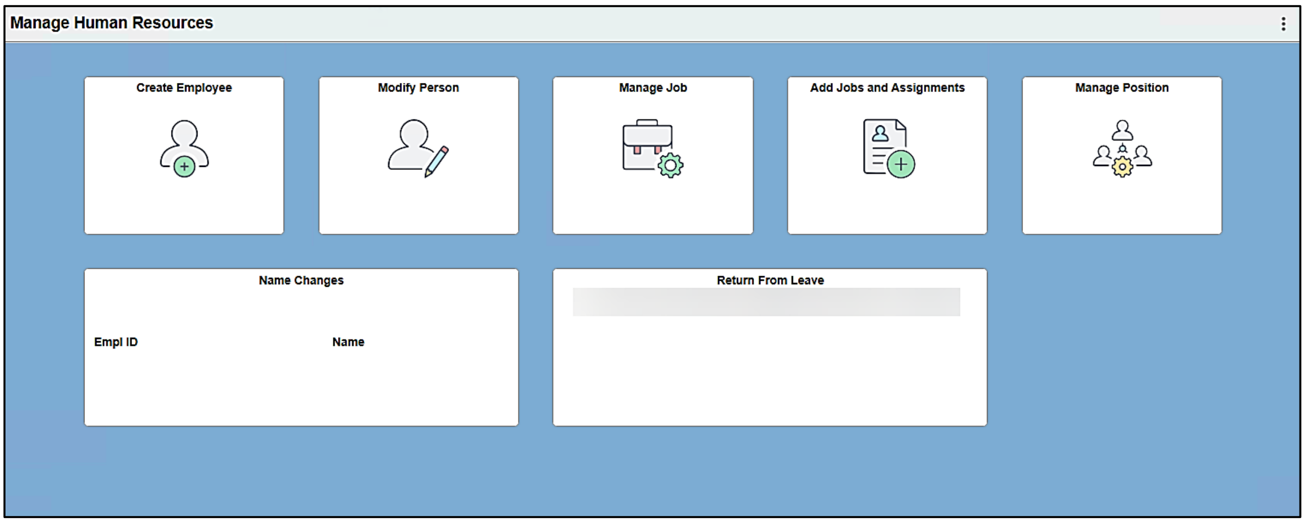
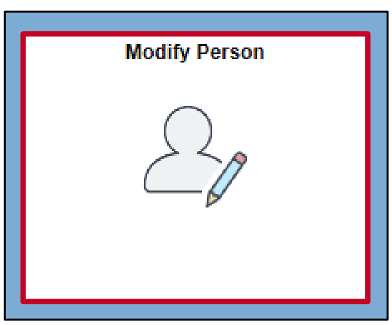
</td></tr>
<tr><td>64.</td><td>Click the Next button.

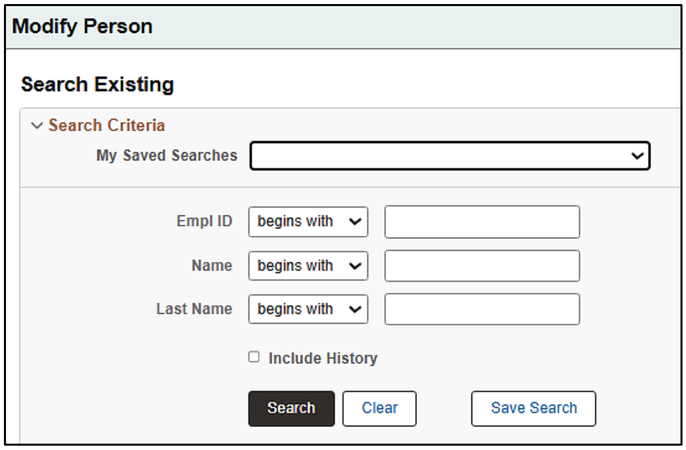
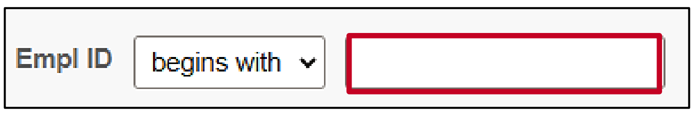
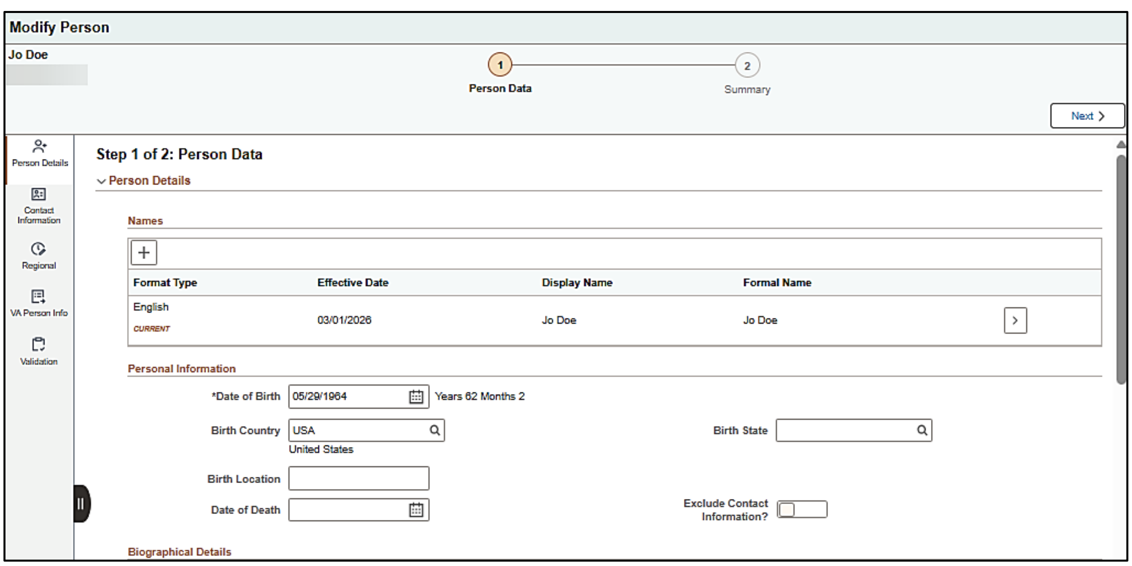


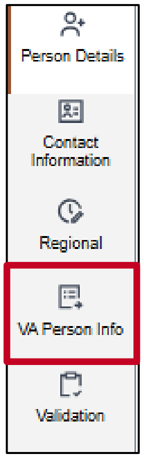
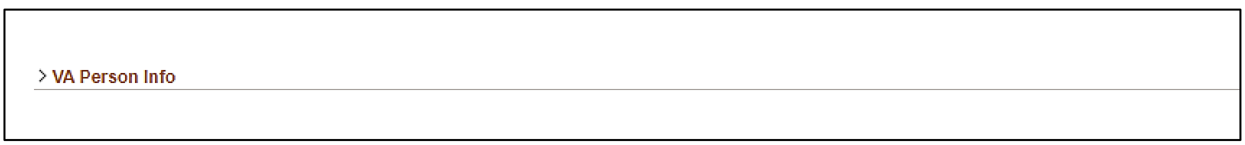
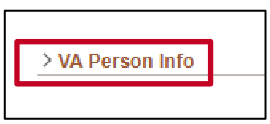
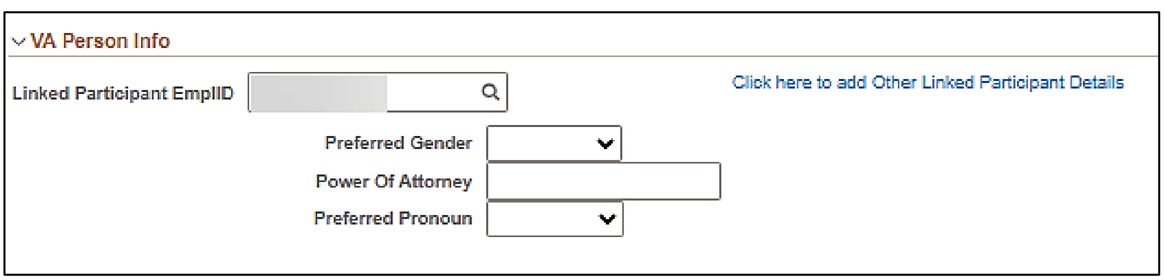
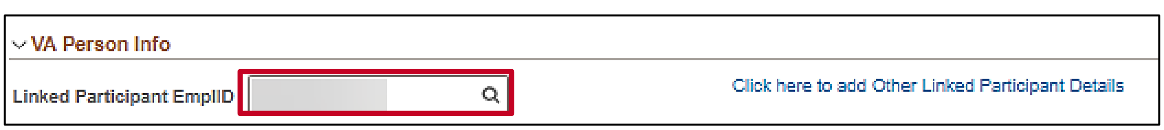
</td></tr>
</table>

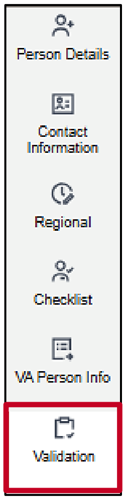
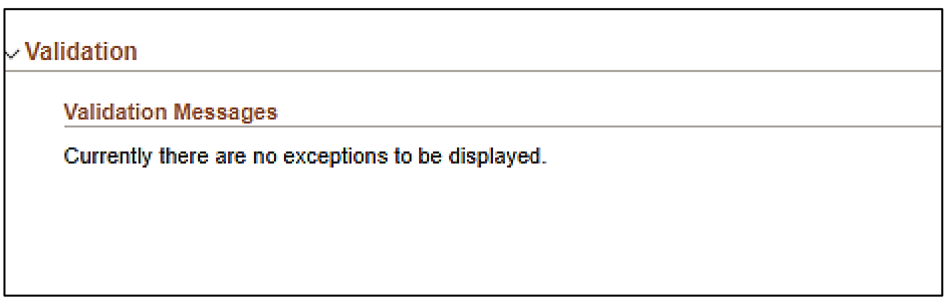
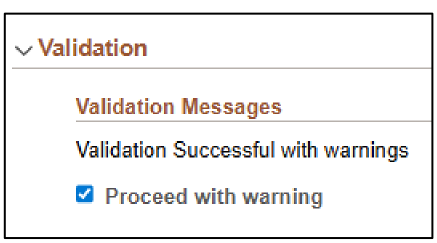
Step	Action
	The **Validation Messages** section displays. 
65.	Review the **Validation Messages** section and click the **Next** button.  **Note**: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting (the **Validation Messages** section will display an **Error** message and the validation will fail). Select the **Proceed with warning** checkbox option if applicable.  

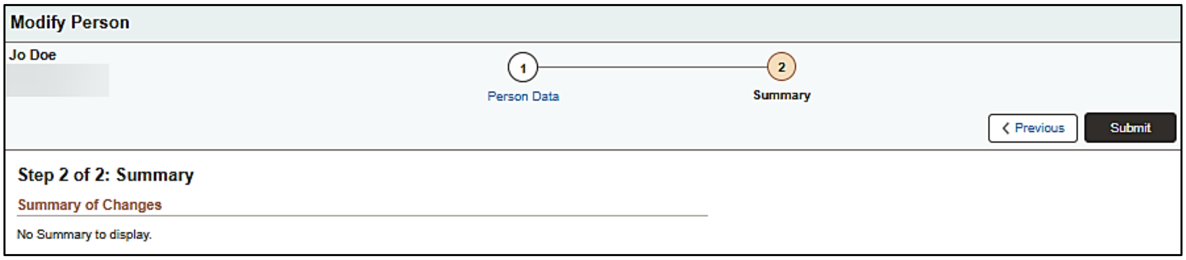
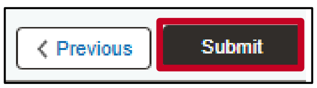
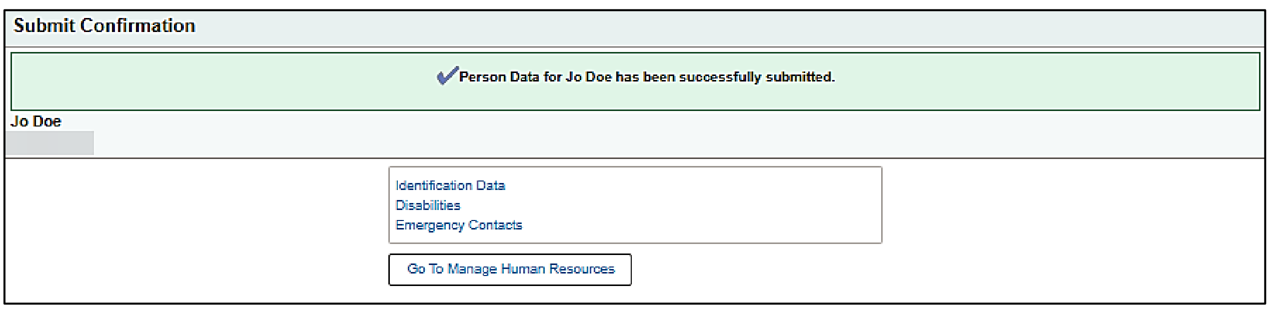
Step	Action
	The **Create Employee Step 3 of 3: Summary** page displays. 
66.	Review the **Summary of Changes** section, and then click the **Submit** button. 
	The **Submit Confirmation** page displays. 
	As a reminder, Cardinal has auto assigned the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for the next steps.

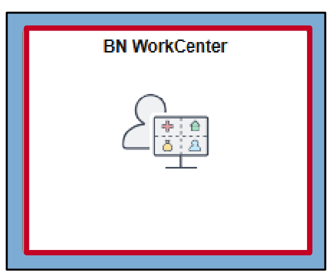
Step	Action
67.	Click the **Go To Manage Human Resources** link on the **Submit Confirmation** page. 
	The **Manage Human Resources** page displays. 
68.	Click the **Modify Person** tile. 

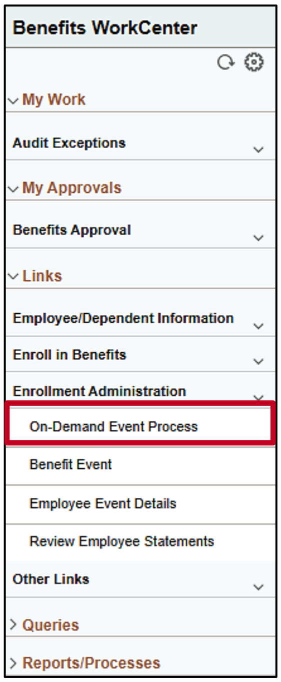
Step	Action
	The **Modify Person Search Existing** page displays. 
69.	Enter the Employee ID for the dependent in the **Empl ID** field. 
70.	Click the **Search** button. 
	The **Modify Person** page displays, **Step 1 of 2: Person Data**, with the **Person Details** tab displayed by default. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>71.</td><td>Click the VA Person Info tab.

</td></tr>
<tr><td colspan="2">The VA Person Info section displays.

</td></tr>
<tr><td>72.</td><td>Click the VA Person Info link to expand the section.

</td></tr>
<tr><td colspan="2">The VA Person Info section expands to show all the fields in this section.

</td></tr>
<tr><td>73.</td><td>Validate that the retiree’s Employee ID is populated in the Linked Participant EmplID field. If not, enter the retiree’s Employee ID.

</td></tr>
</table>

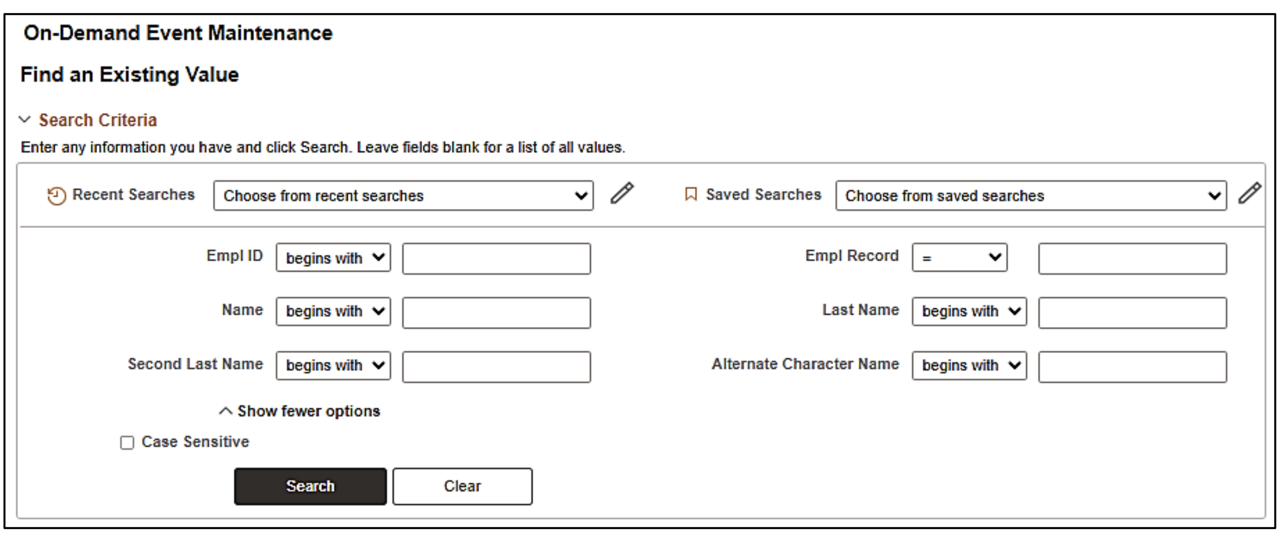
Step	Action
74.	Click the **Validation** tab. 
	The **Validation** section displays. 
	Validation messages may appear that include warnings and errors. If a **Validation warning** message appears, review the warning and make updates as needed or proceed with warning. **Error** messages must be addressed prior to saving. 
75.	Click the **Next** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Modify Person Step 2 of 2: Summary page displays the Summary of Changes.

</td></tr>
<tr><td>76.</td><td>Click the Submit button.

</td></tr>
<tr><td colspan="2">The Submit Confirmation page displays.

</td></tr>
<tr><td>77.</td><td>Click the Home button in the top right corner of the page to return to the Cardinal HCM Homepage, and then click the BN WorkCenter tile to navigate to the On-Demand Event Process page.

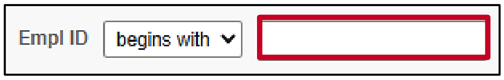

</td></tr>
</table>

Step	Action
78.	Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > On-Demand Event Process** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also navigate to the **On-Demand Event Process** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

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

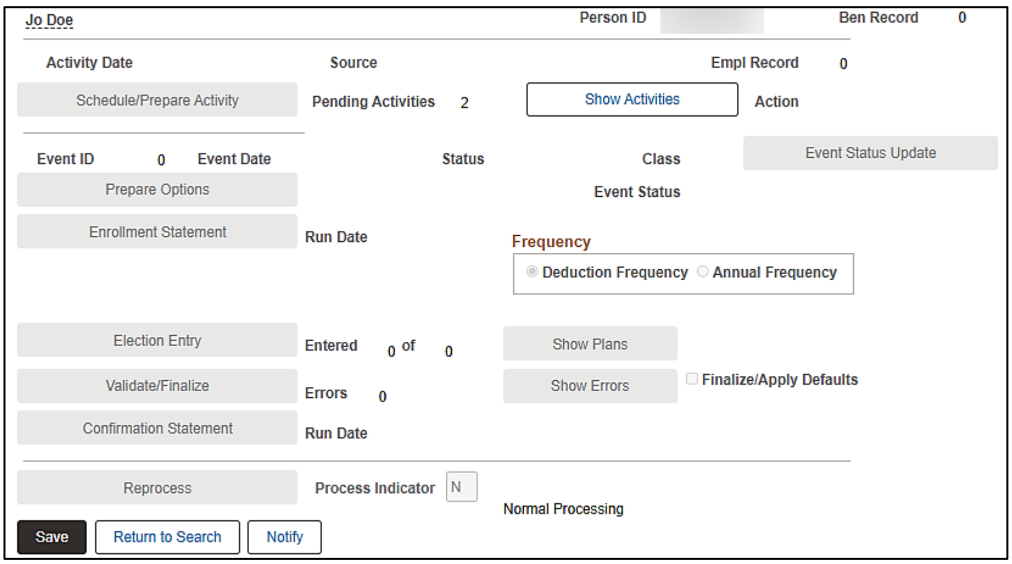


Step	Action
79.	Enter the Employee ID of the dependent just hired in the **Empl ID** field.



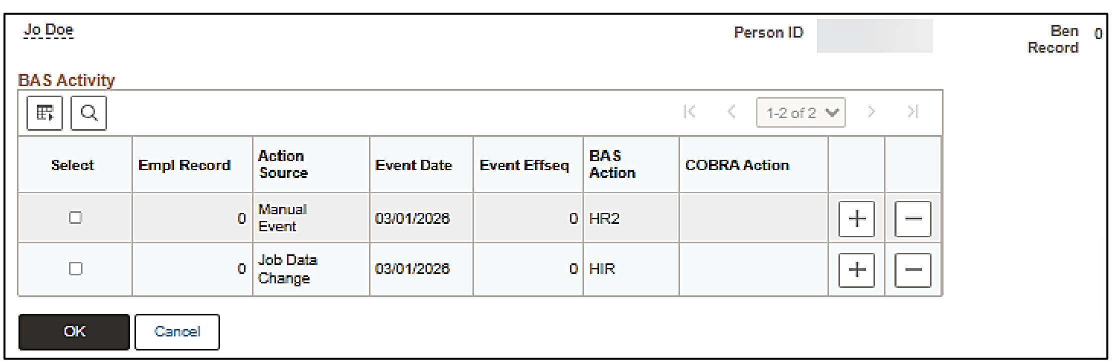
Step	Action
80.	Click the **Search** button.

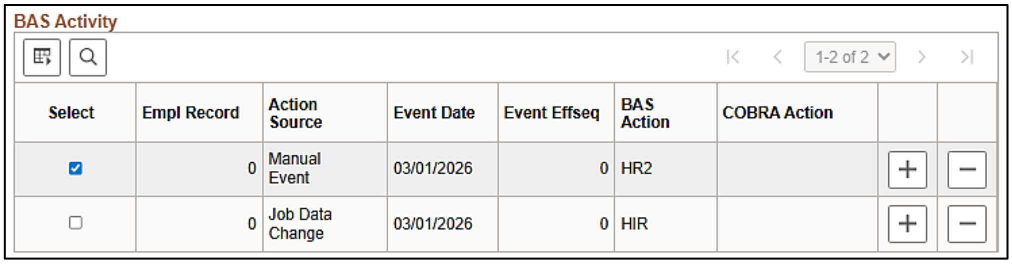
The **On-Demand Event Process** page displays.



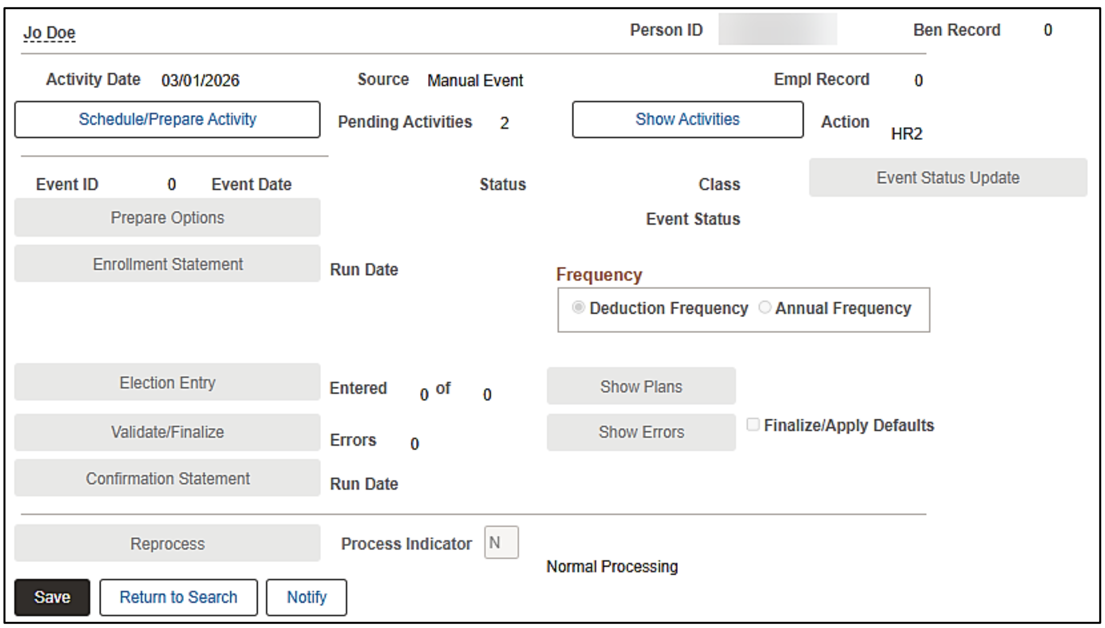
Step	Action
81.	Click the **Show Activities** button.

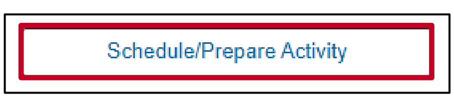
The **BAS Activity** page displays in a pop-up window.

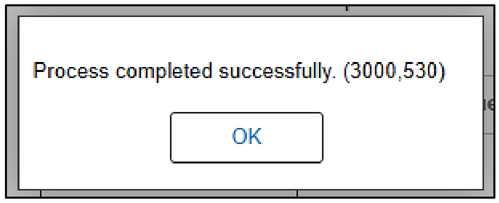
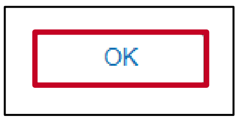
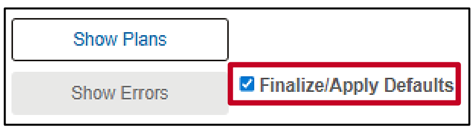
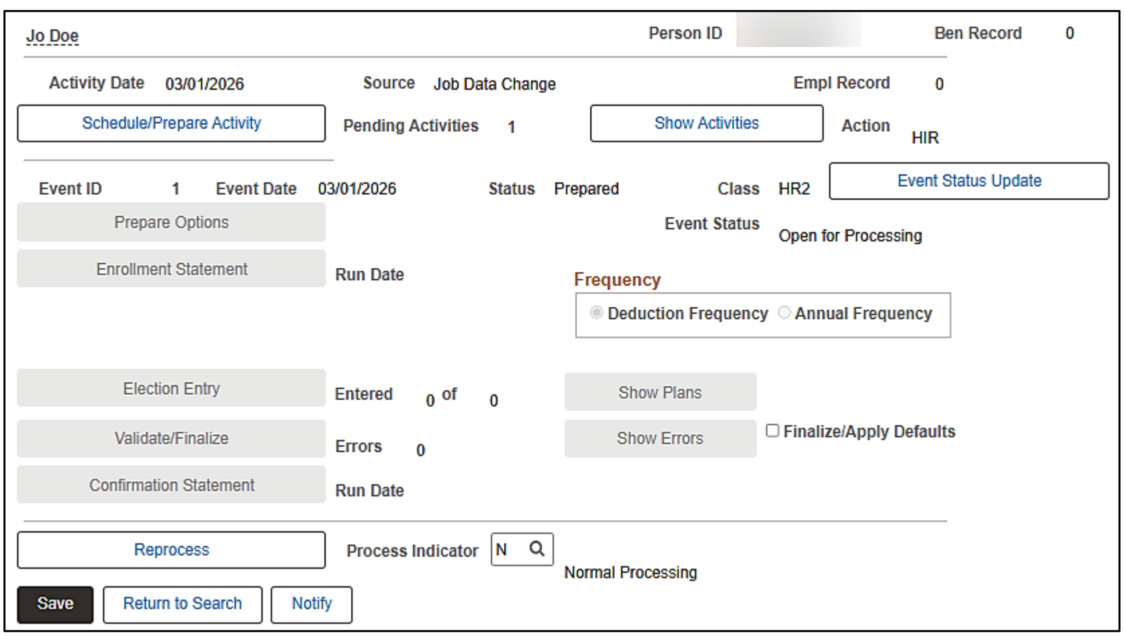


Step	Action
82.	Select the “HR2” **BAS Action** checkbox. 
83.	Click the **OK** button. 

The **On-Demand Event Process** redisplays.

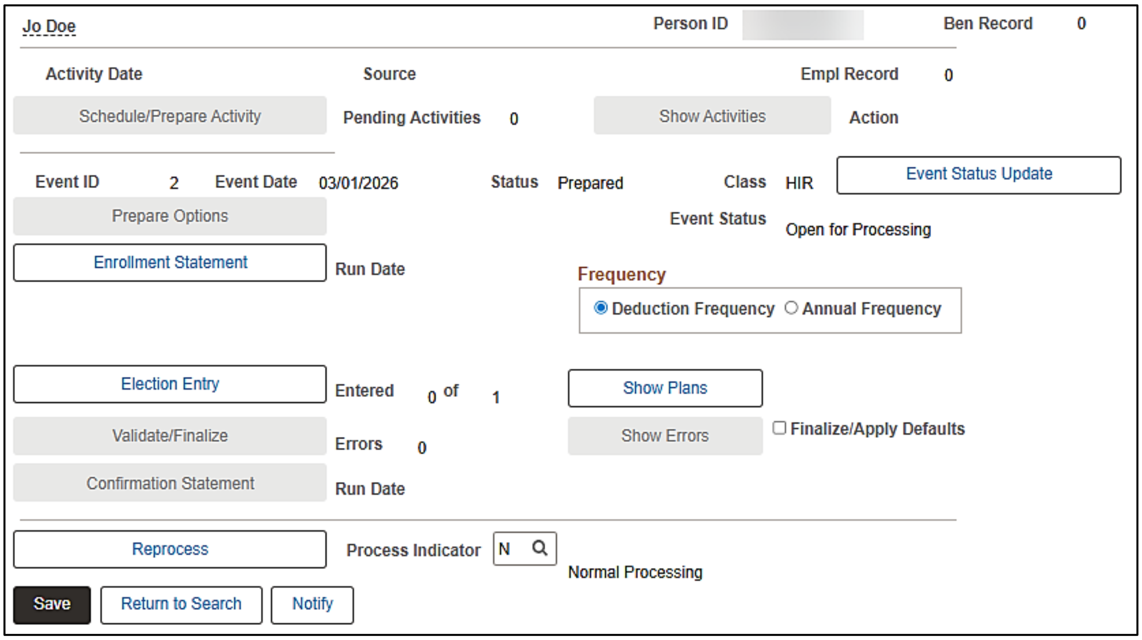


Step	Action
84.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. 

Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
85.	Click the **OK** button to close the message. 
86.	Select the **Finalize/Apply Defaults** checkbox option. 
87.	Click the **Validate/Finalize** button. 
	The **On-Demand Event Process** page redisplays with the HIR Event. 

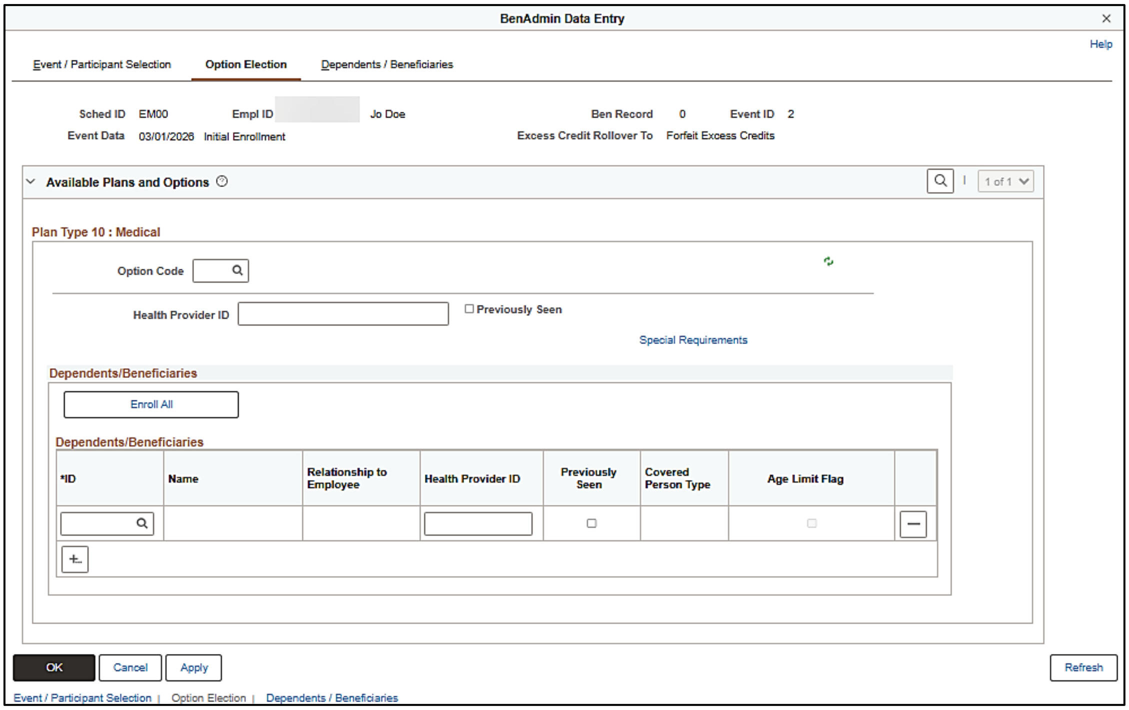
Step	Action
88.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. 

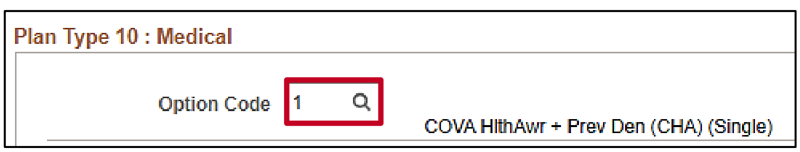
The **On-Demand Event Process** page redisplays.

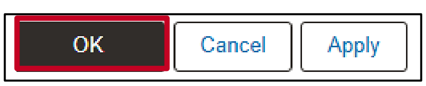


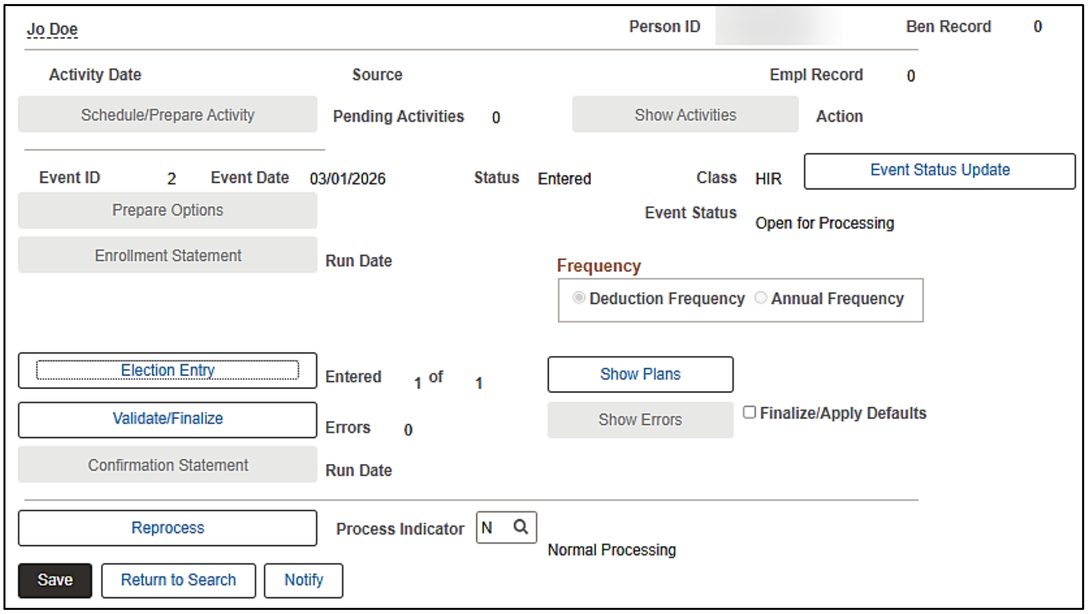
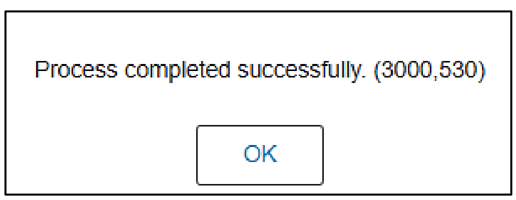
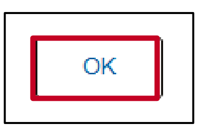
Step	Action
89.	Click the **Election Entry** button. 

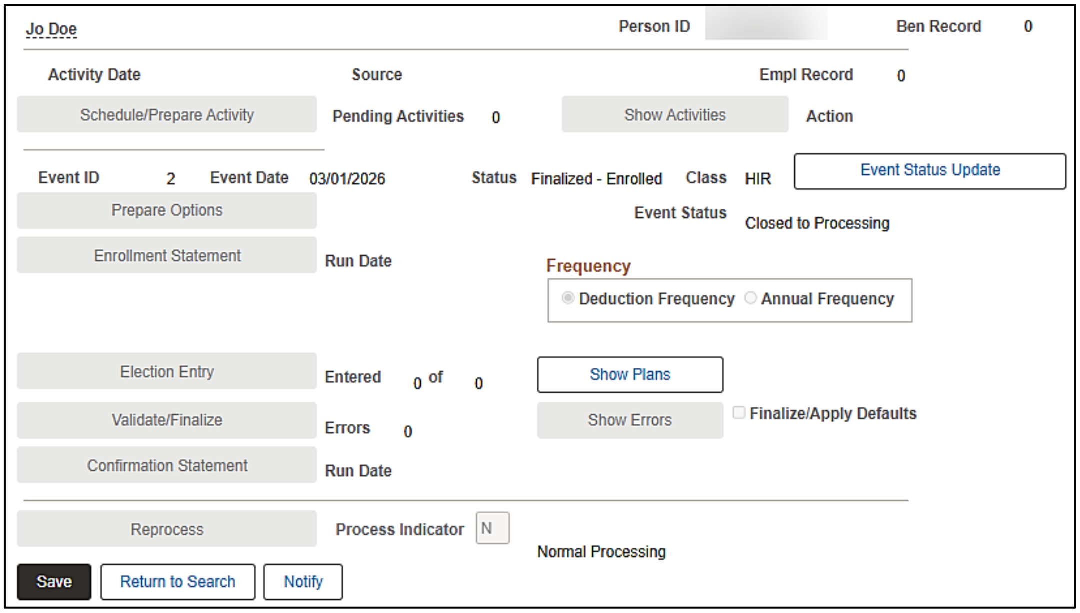
Step	Action
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.	
90.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section and select the applicable Option Code. In this example, Option Code “1” is selected – “COVA HlthAwr + Prev Den (CHA) (Single)”
91.	Click the **OK** button.







Step	Action
	The **On-Demand Event Process** page redisplays. 
92.	Click the **Validate/Finalize** button. 
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
93.	Click the **OK** button. 

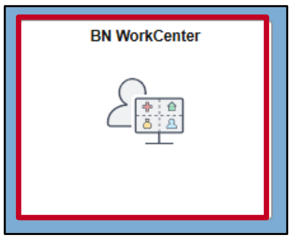
Step	Action
The **On-Demand Event Process** page redisplays. 	
	The retiree is now enrolled in Medicare, the dependent (the spouse in this example) has been hired into Cardinal, linked to the retired employee, and enrolled in single coverage medical.

Scenario 3: Under 65 Employee with Dependent Turning 65

In this scenario, the retired employee has “Employee + Spouse” coverage, the retiree is not eligible for Medicare, but the spouse turns 65 and is eligible for Medicare. Once the Agency BA confirms that the spouse is eligible for Medicare, the BA must create a Life Event (GEM) to change the retiree’s coverage from “Employee + Spouse” to “Single”. Then, the BA must hire the spouse and enroll the spouse in Medicare Benefits.

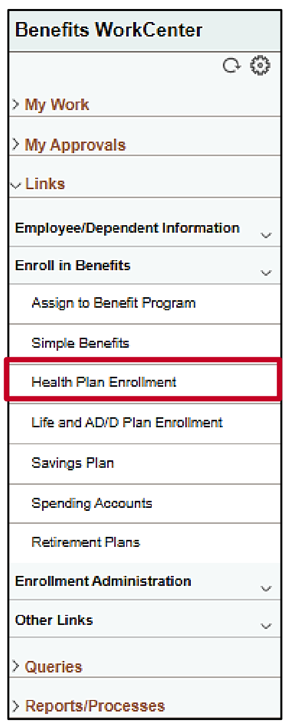
Process the Medicare Manual Event

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Health Plan Enrollment page by clicking the BN WorkCenter tile.

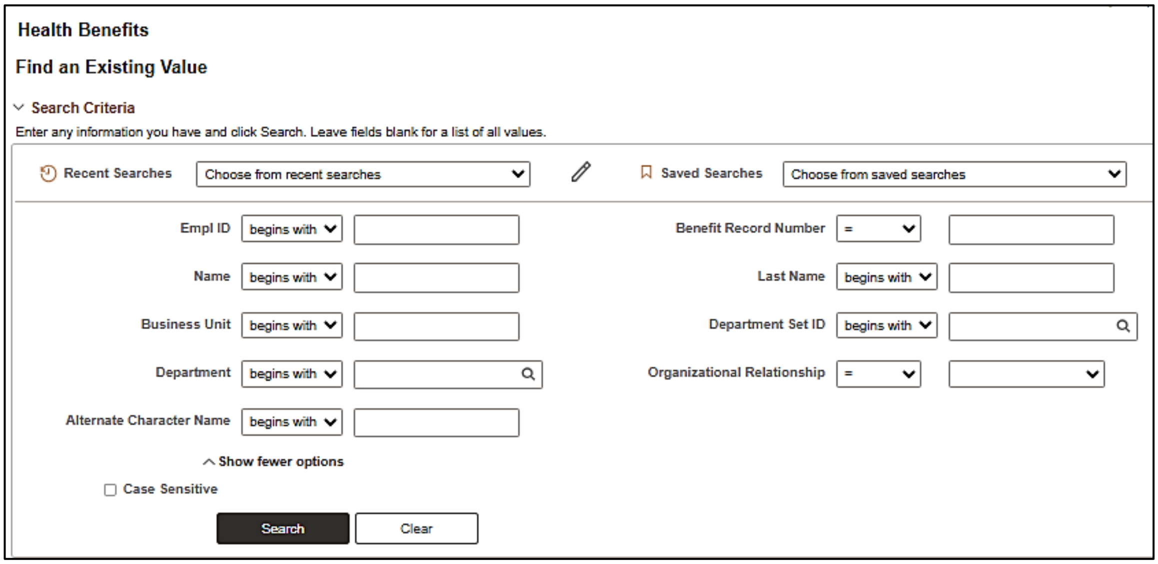


</td></tr>
<tr><td></td><td>For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>2.</td><td>Use the following navigation path in the WorkCenter: Links > Enroll in Benefits > Health Plan Enrollment

Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.



</td></tr>
</table>

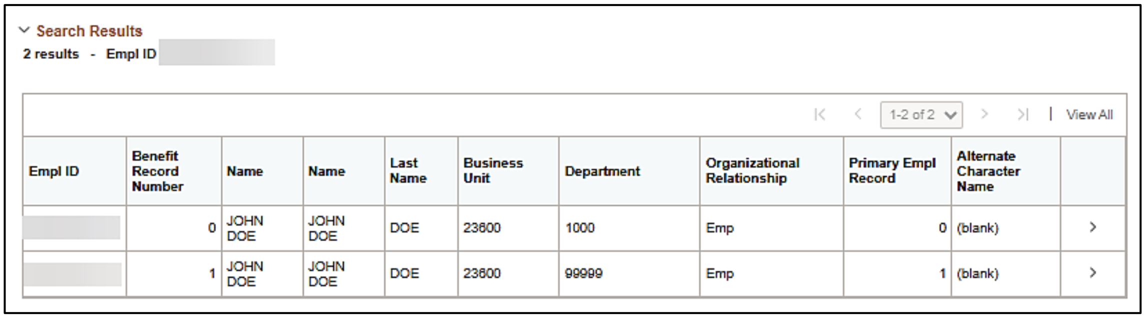
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Users can also access the Health Plan Enrollment page using the following path:
NavBar > Menu > Benefits > Enroll in Benefits > Health Plan Enrollment</td></tr>
<tr><td colspan="2">The Health Benefits Find an Existing Value Search page displays.

</td></tr>
<tr><td></td><td>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.</td></tr>
<tr><td>3.</td><td>Enter the retiree’s Employee ID in the Empl ID field.
Note: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

</td></tr>
<tr><td>4.</td><td>Click the Search button.

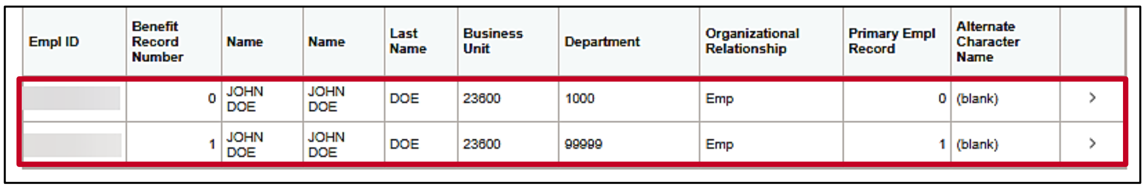
</td></tr>
</table>

Step	Action

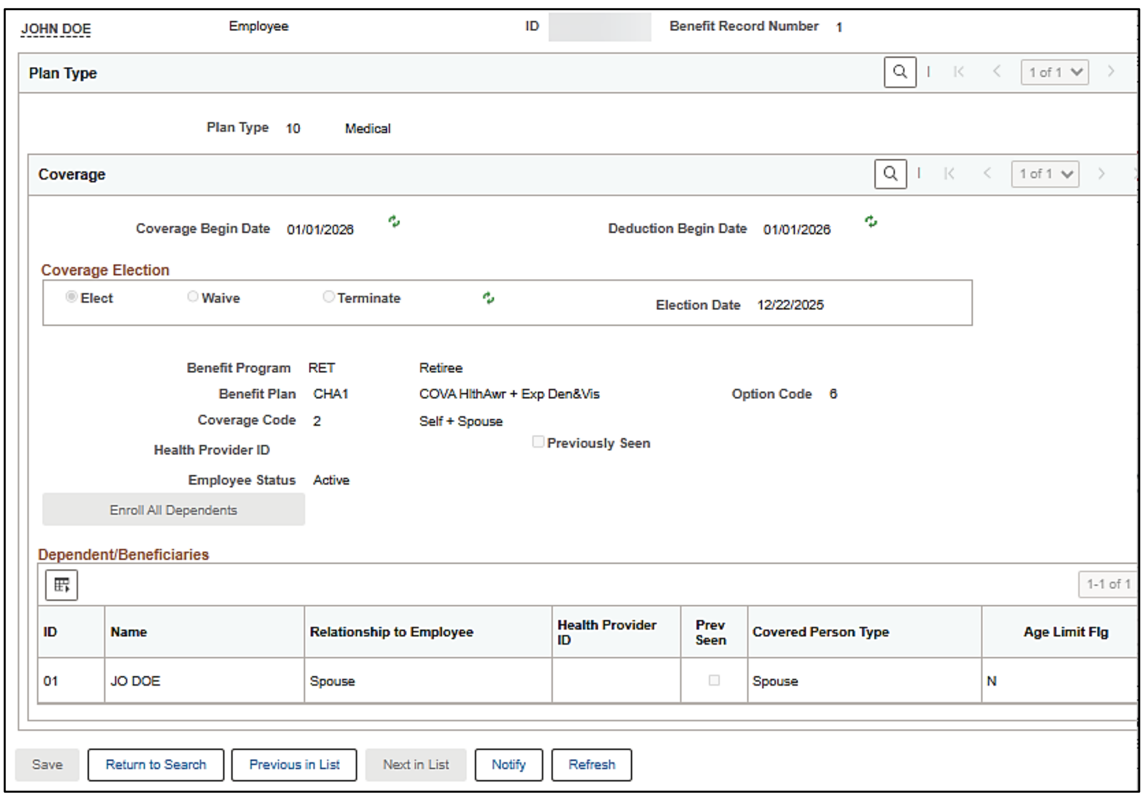
The Search Results display.



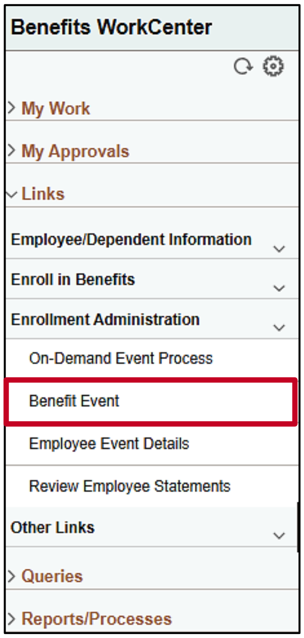
5. Click the **Drill In** (**>**) icon on any row in the Search Results..



The **Health Plan Enrollment** page displays for the selected retiree.

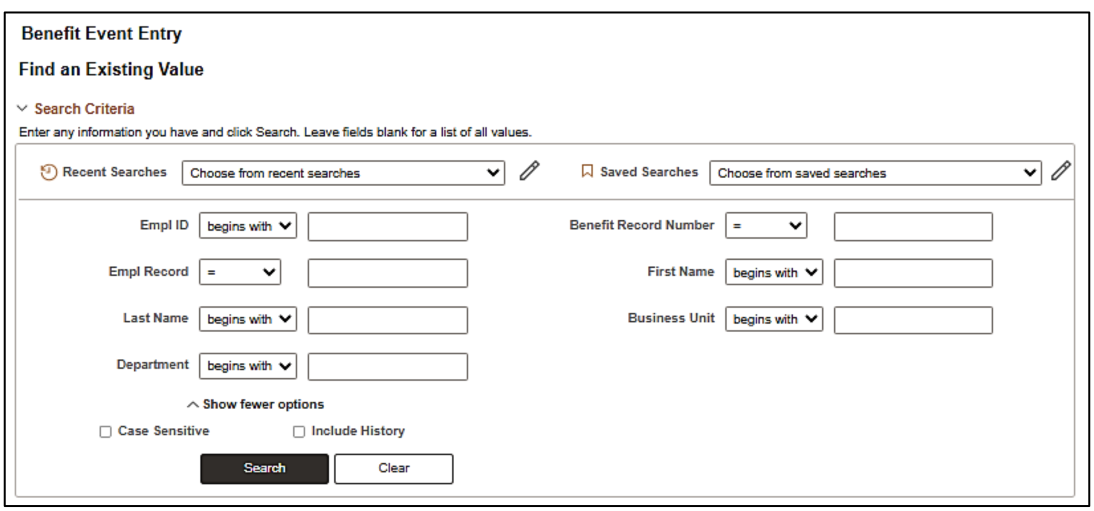


Step	Action
ℹ	In this example, the Agency BA can see that the retiree currently has a "Self + Spouse" medical coverage with their spouse covered under the current medical plan.
6.	Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > Benefit Event**



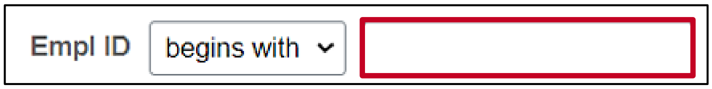
Step	Action
ℹ	Users can also access the **Benefits Event** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**

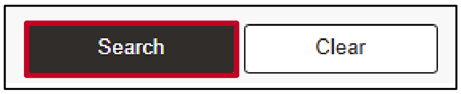
The **Benefit Event Entry Find an Existing Value Search** page displays.

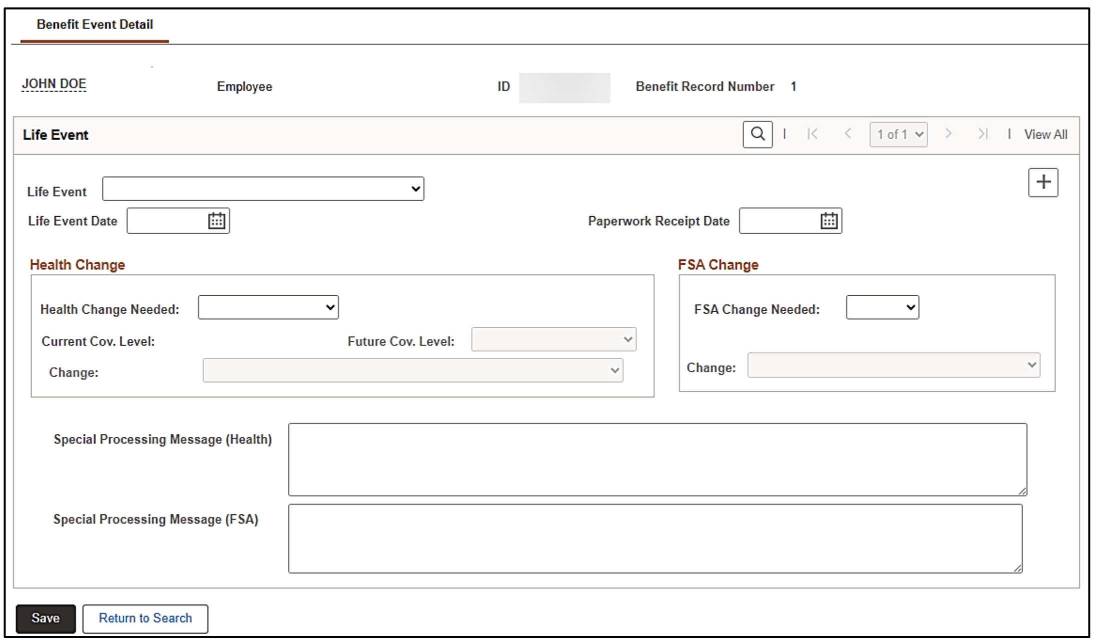


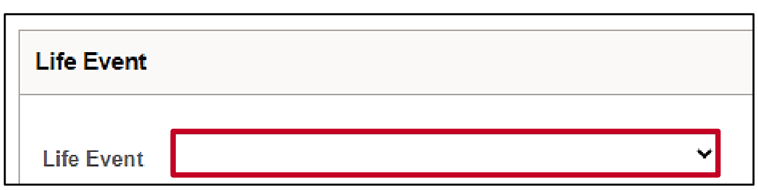
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Enter the retiree’s Employee ID in the Empl ID field.

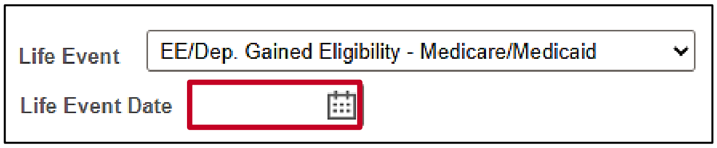
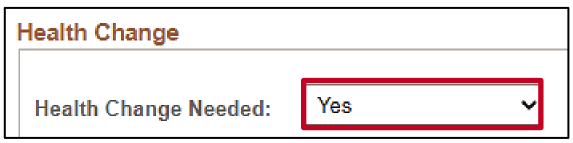
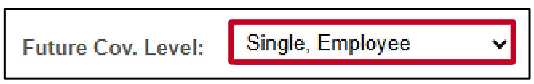
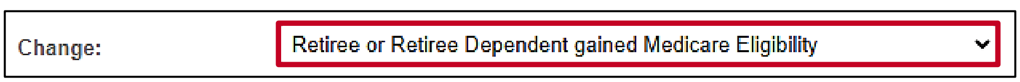
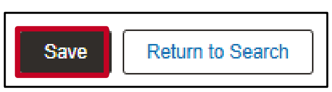
Note: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.


</td></tr>
<tr><td>8.</td><td>Click the Search button.

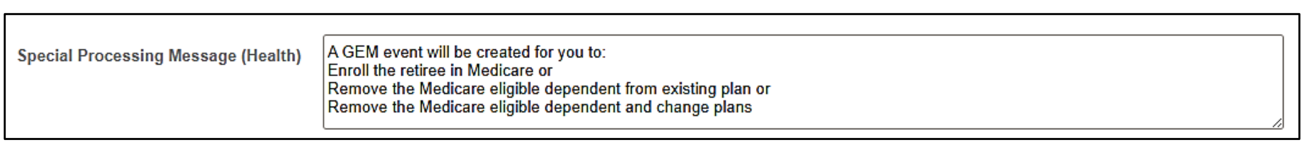

</td></tr>
<tr><td colspan="2">The Benefit Event Detail page displays for the selected retiree.


</td></tr>
<tr><td>9.</td><td>Click the Life Event dropdown button and select “EE/Dep. Gained Eligibility – Medicare/Medicaid” list item.


</td></tr>
</table>

Step	Action
10.	Enter the Effective Date in the **Life Event Date** field. **Note**: The Life Event Date is the first of the month in which the spouse is eligible for Medicare. 
11.	Enter the **Paperwork Receipt Date**. 
12.	Click the **Health Change Needed** dropdown button and select “Yes”. 
13.	Click the **Future Cov. Level** dropdown button and select “Single, Employee”. 
14.	Click the **Change** dropdown button and select “Retiree or Retiree Dependent gained Medicare Eligibility”. 
15.	Click the **Save** button. 

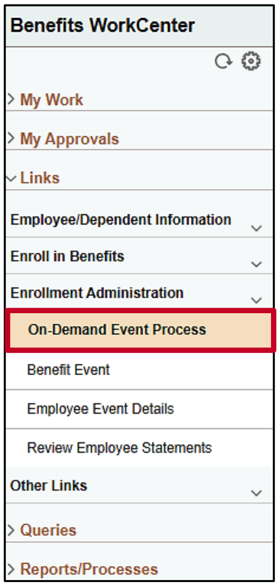
A **Special Processing Message (Health)** displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created.



Now that the GEM Event has been created, it must be processed.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16.</td><td>

Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > On-Demand Event Process**



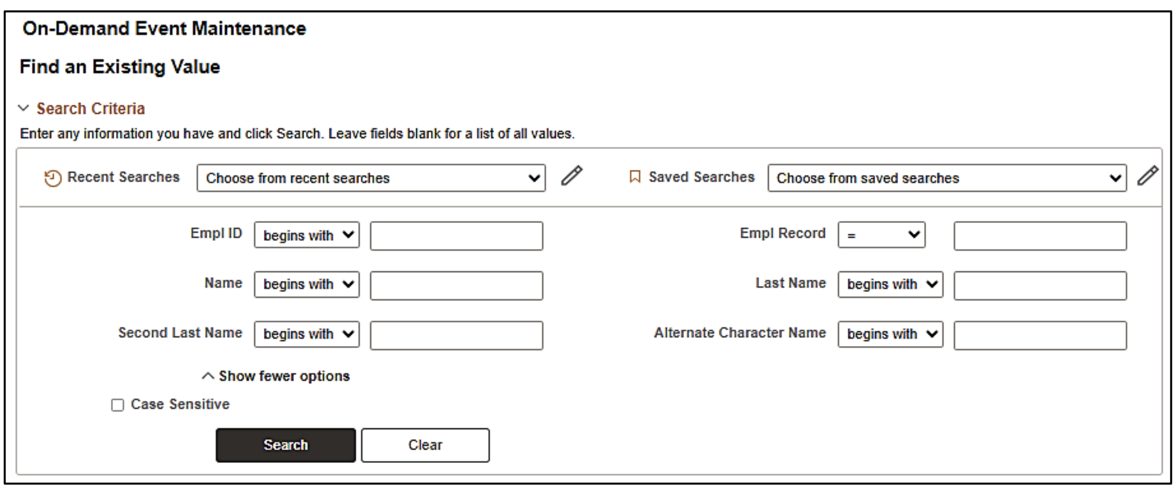
</td></tr>
<tr><td></td><td>

Users can also navigate to the **On-Demand Event Process** page using the following path:

NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

</td></tr>
<tr><td colspan="2">

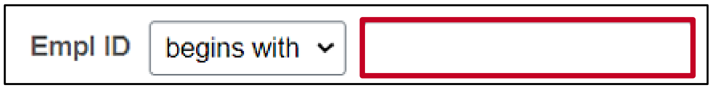
The **On-Demand Event Maintenance Find an Existing Value Search** page displays.

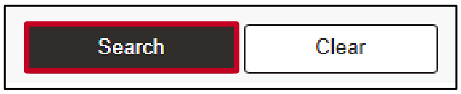


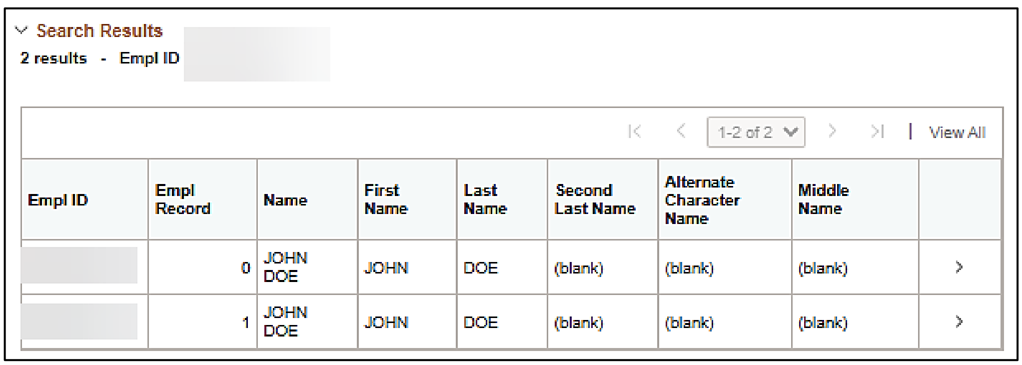
</td></tr>
</table>

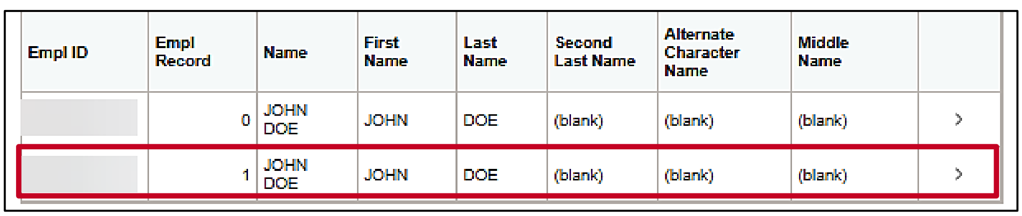
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>17.</td><td>Enter the retiree’s Employee ID in the Empl ID field.

Note: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.


</td></tr>
<tr><td>18.</td><td>Click the Search button.

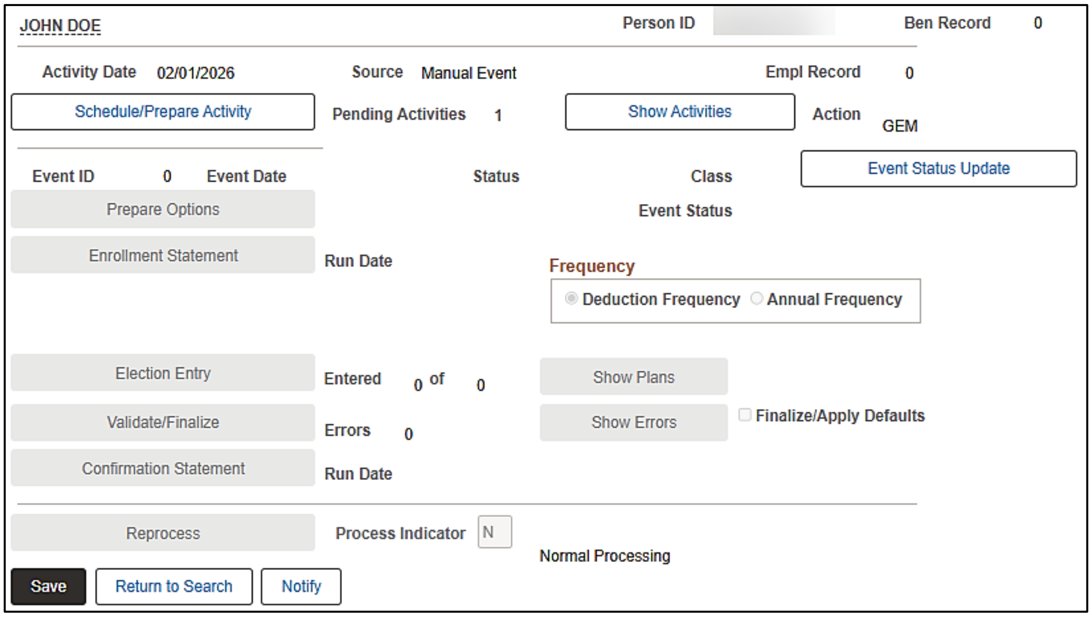

</td></tr>
<tr><td>19.</td><td>The Search Results display.


</td></tr>
<tr><td>20.</td><td>Click the Drill In (>) icon on the highest numbered job record row.


</td></tr>
</table>

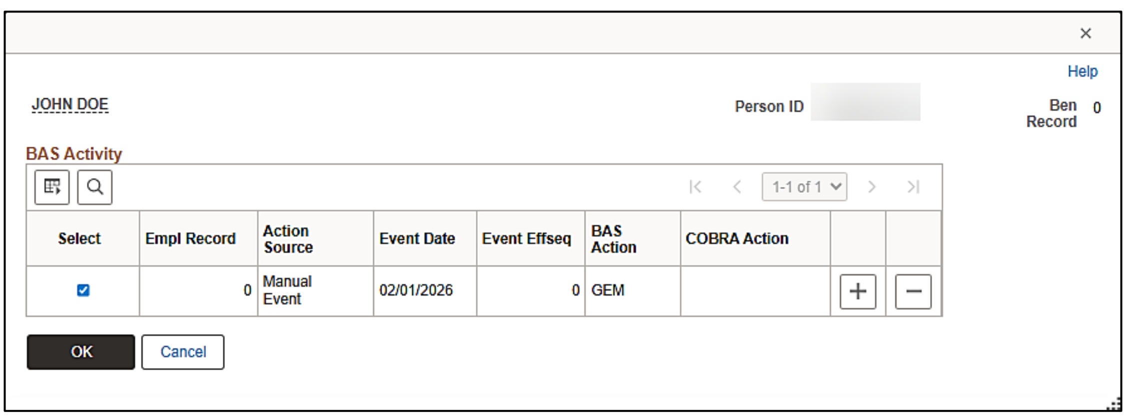
Step	Action

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

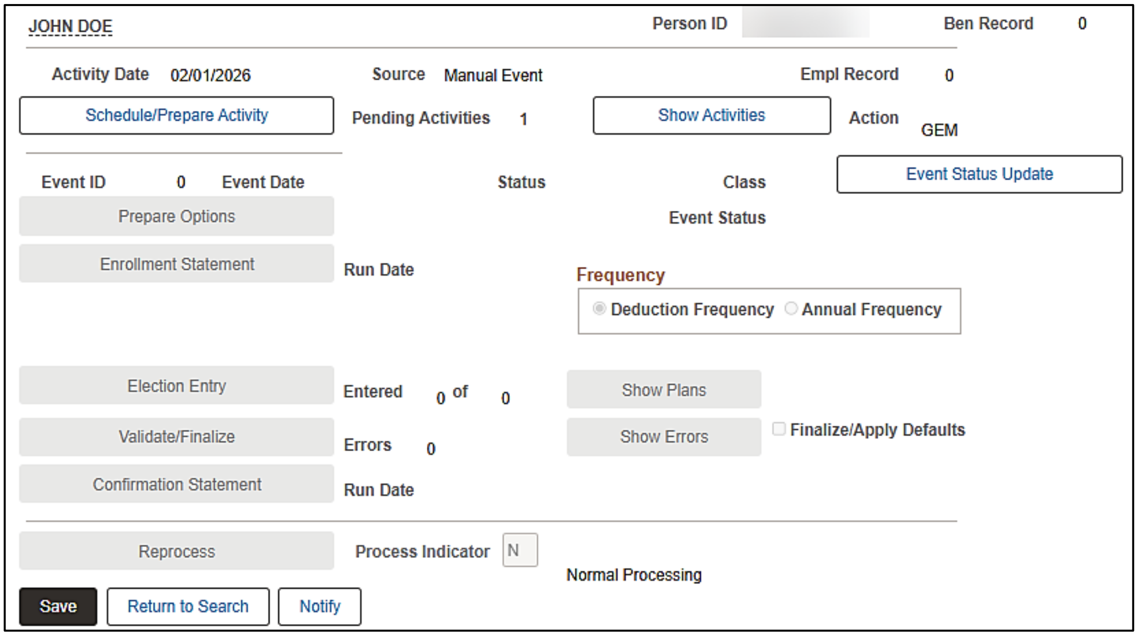
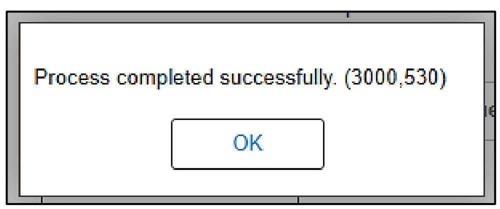
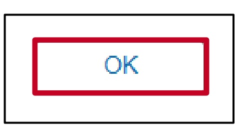


21. Click the **Show Activities** button.

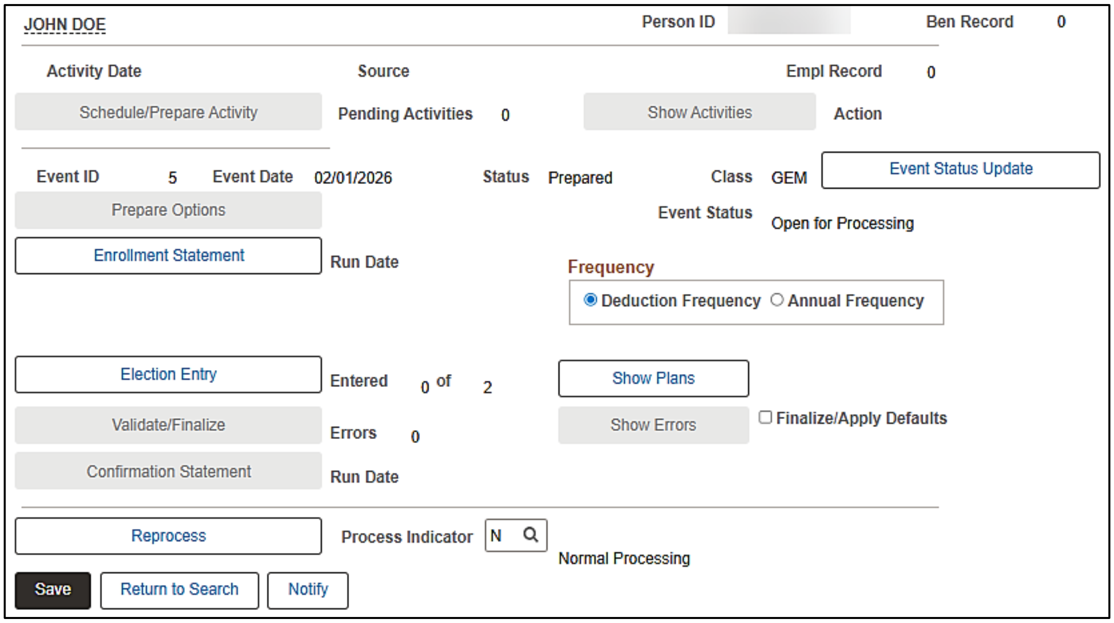
The **BAS Activity** page displays in a pop-up window.

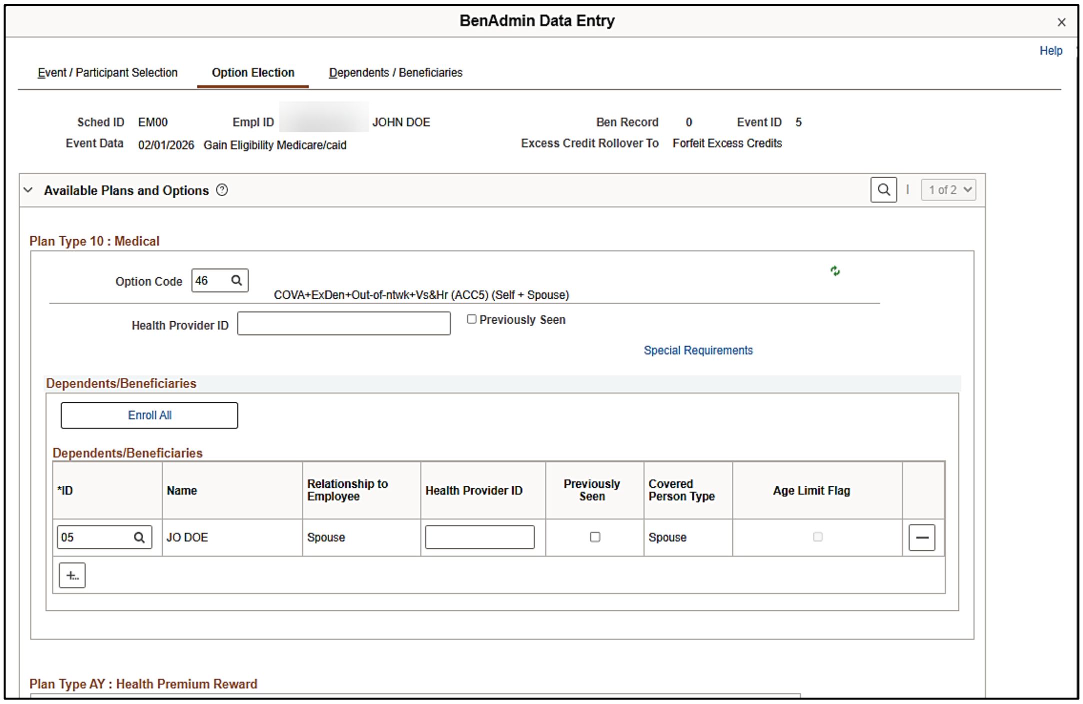
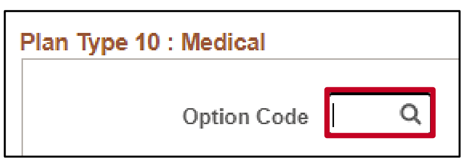


22. Click the **OK** button.

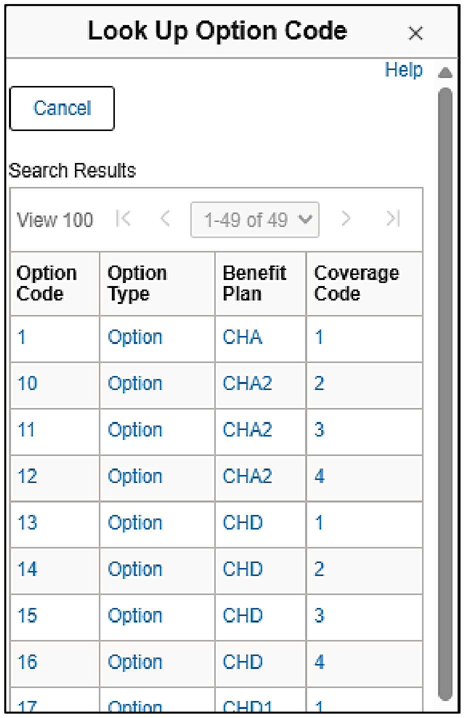
Step	Action
The **On-Demand Event Process** page redisplays. 	
23.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. 
A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	
24.	Click the **OK** button to close the message. 

Step	Action
The **On-Demand Event Process** page redisplays.	
25.	Click the **Election Entry** button.



Step	Action
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default. 	
26.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section. 

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


Look Up Option Code

Help

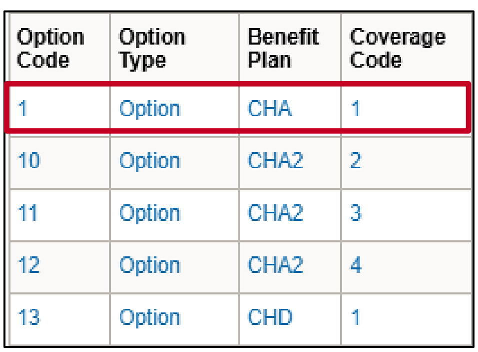
Cancel

Search Results

View 100 1-49 of 49

Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1

Step	Action
27.	Select the applicable Option Code. In this example, Option Code “1” is selected.

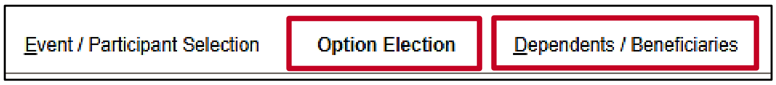


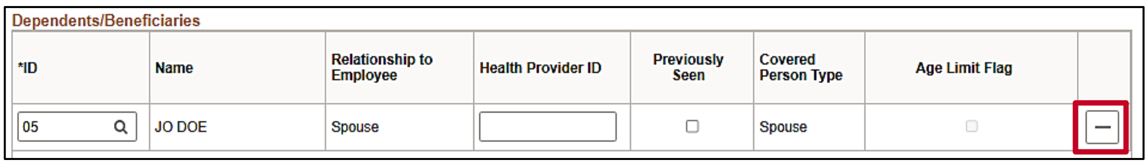
Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1

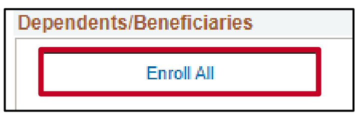
The **Plan Type 10: Medical** section redisplays with the selected Option Code displayed.

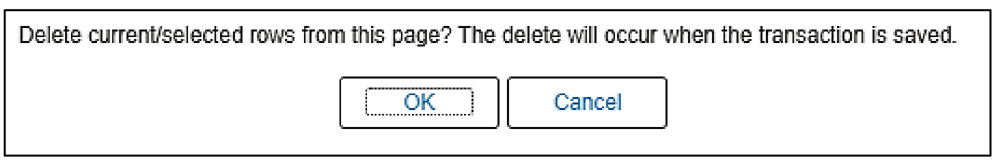
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>28.</td><td>Before removing the spouse, make sure to record all the personal information for the new hire process (e.g., Date of Birth, Full Name, Address, etc.).

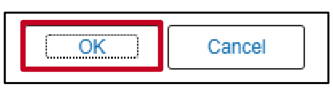
Note: This information can be obtained from the Dependents / Beneficiaries page and then returning to the Option Election page.

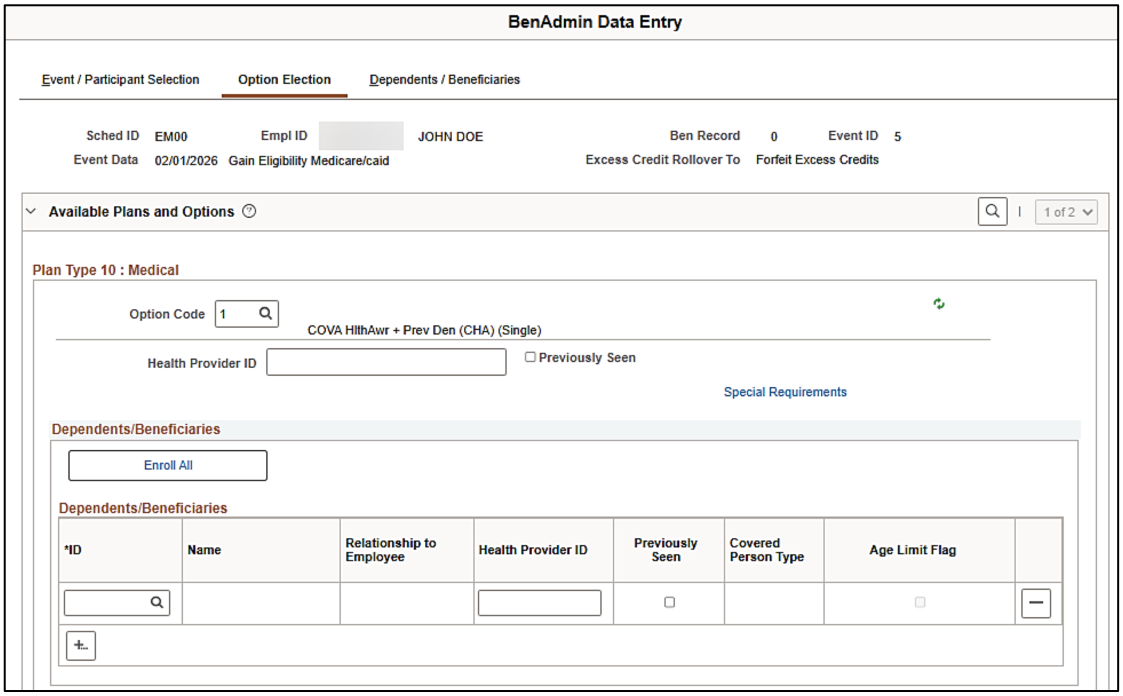
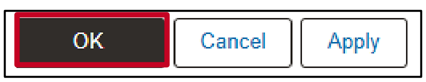

</td></tr>
<tr><td>29.</td><td>From the Option Election page, click the Delete Row (-) icon to remove the spouse in the Dependent/Beneficiaries section.

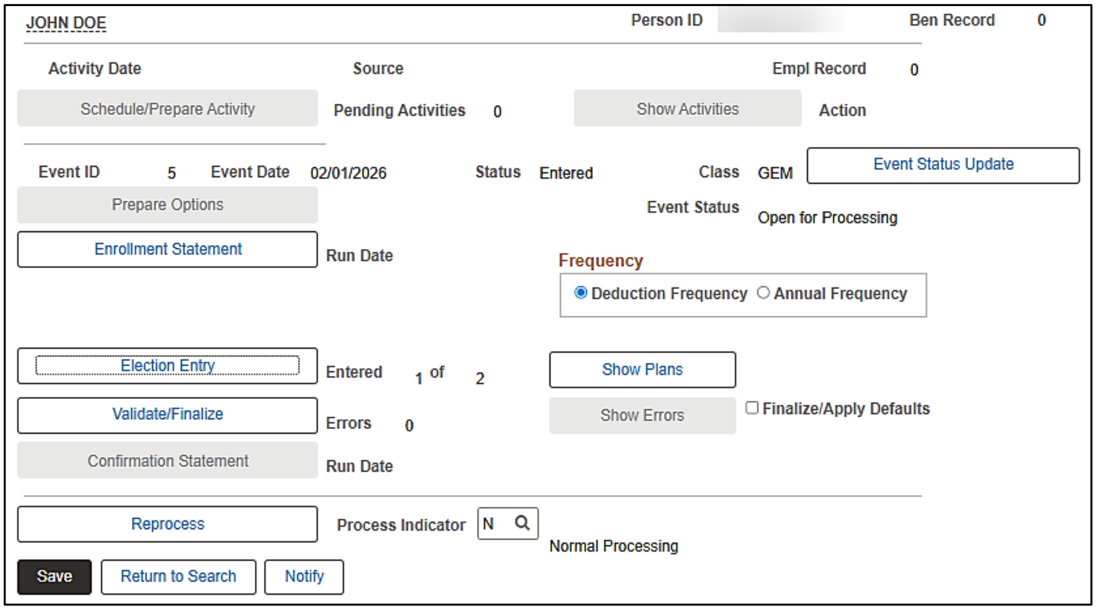
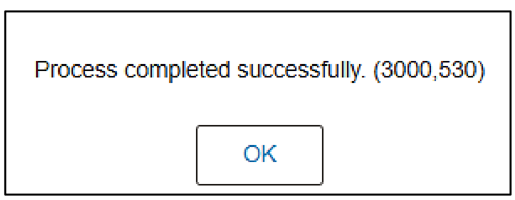
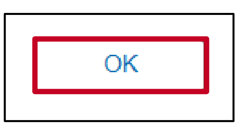

</td></tr>
<tr><td></td><td>Optionally, users can click the Enroll All button to remove the spouse.


</td></tr>
<tr><td colspan="2">A Warning message displays in a pop-up window when the row is manually deleted.

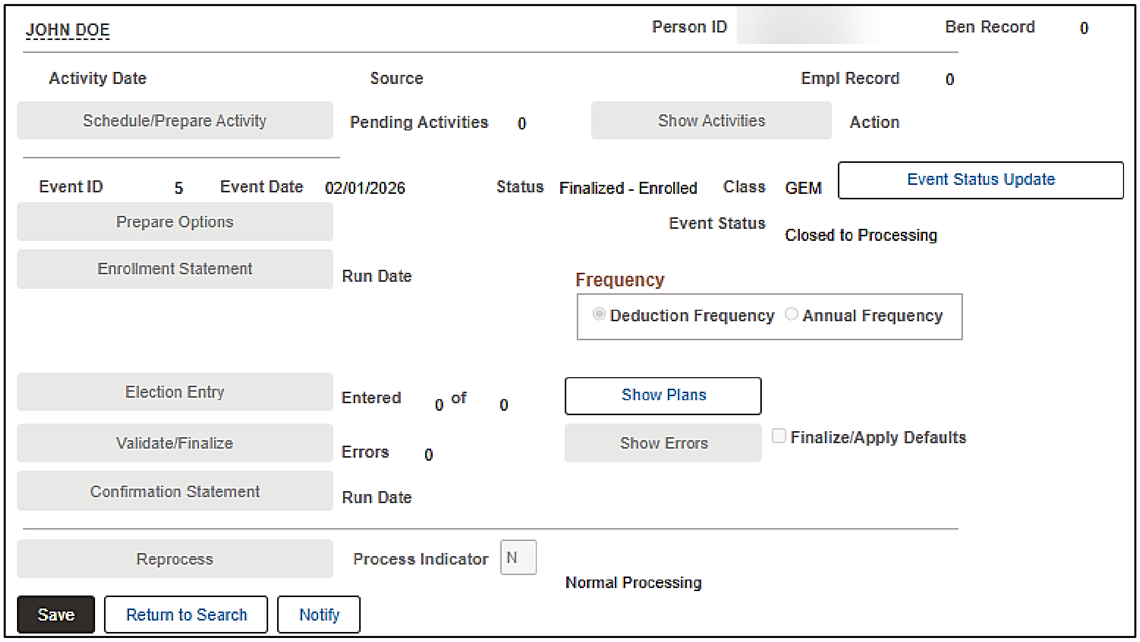

</td></tr>
<tr><td>30.</td><td>Click the OK button.


</td></tr>
</table>

Step	Action
	The **Option Election** page redisplays with spouse removed from the **Dependents/Beneficiaries** section. 
31.	Click the **OK** button. 

Step	Action
	The **On-Demand Event Process** page redisplays. 
32.	Click the **Validate/Finalize** button. 
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
33.	Click the **OK** button to close the message. 

Step	Action
	The **On-Demand Event Process** redisplays.

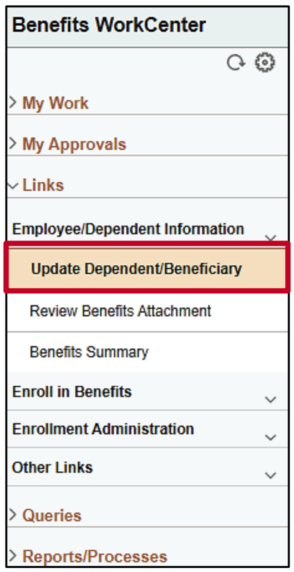


Hire the Spouse as an Employee

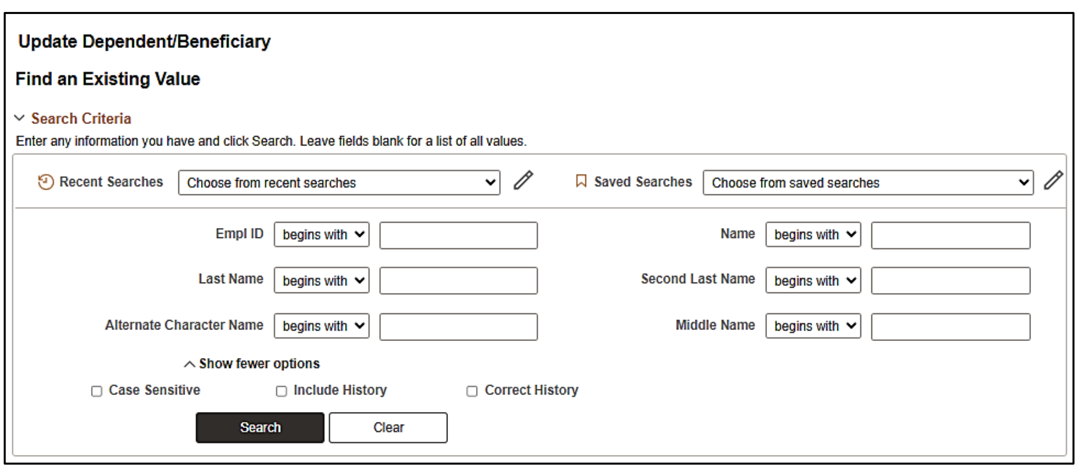
Now that the retiree’s benefit election has been updated to “Single”, the Agency BA must now hire the spouse as an employee in Cardinal.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Use the following navigation path in the WorkCenter: Links > Employee/Dependent Information > Update Dependent/Beneficiary

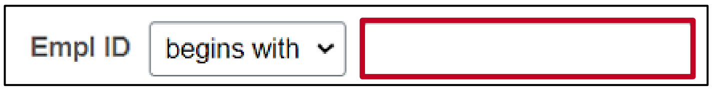
Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.


</td></tr>
<tr><td></td><td>Users can also access the Update Dependent/Beneficiary page using the following path:

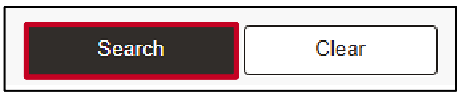
NavBar > Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary</td></tr>
<tr><td colspan="2">The Update Dependent/Beneficiary Find an Existing Value Search page displays.


</td></tr>
</table>

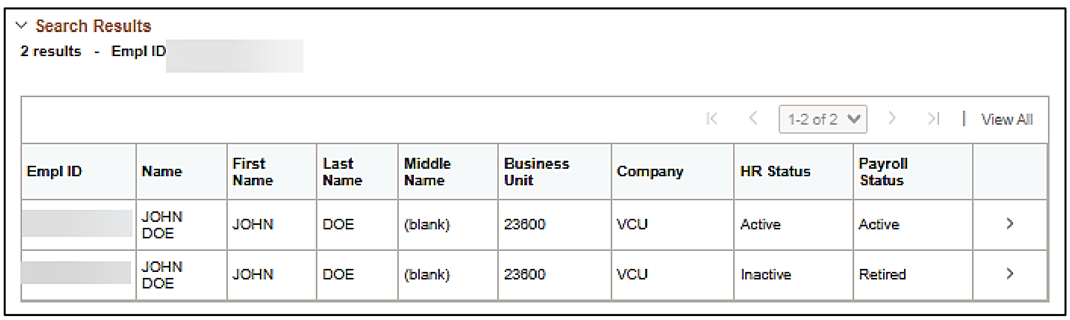
Step	Action
(i)	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
2.	Enter the retiree's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable retiree using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.



Step	Action
3.	Click the **Search** button.

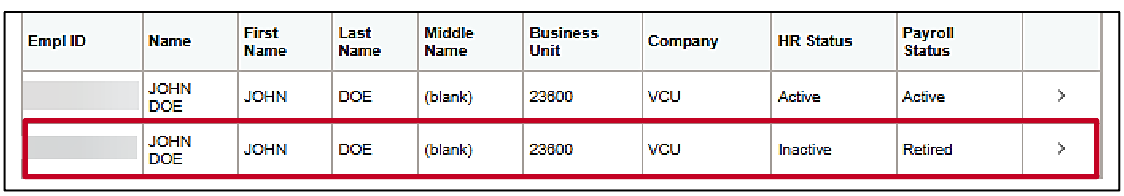


The Search Results display.



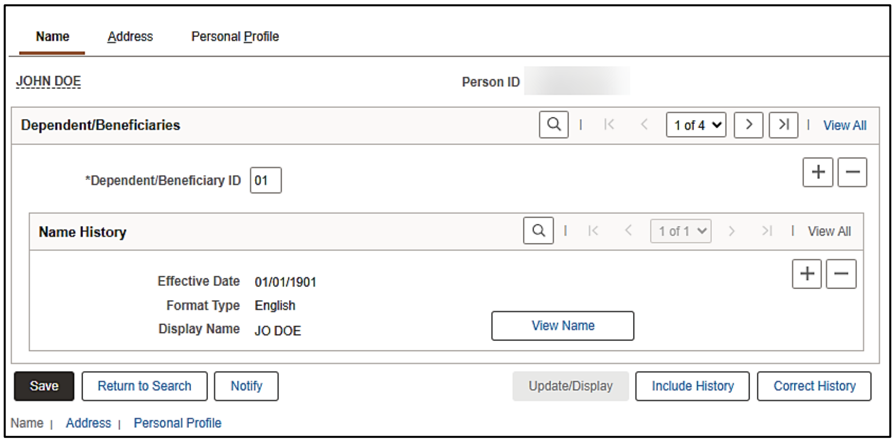
Empl ID	Name	First Name	Last Name	Middle Name	Business Unit	Company	HR Status	Payroll Status	
	JOHN DOE	JOHN	DOE	(blank)	23600	VCU	Active	Active	>
	JOHN DOE	JOHN	DOE	(blank)	23600	VCU	Inactive	Retired	>

Step	Action
4.	Click the **Drill In** (**>**) icon on the retirement job record row.

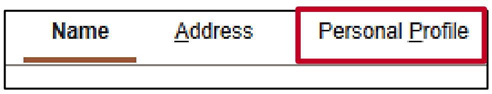


Empl ID	Name	First Name	Last Name	Middle Name	Business Unit	Company	HR Status	Payroll Status	
	JOHN DOE	JOHN	DOE	(blank)	23600	VCU	Active	Active	>
	JOHN DOE	JOHN	DOE	(blank)	23600	VCU	Inactive	Retired	>

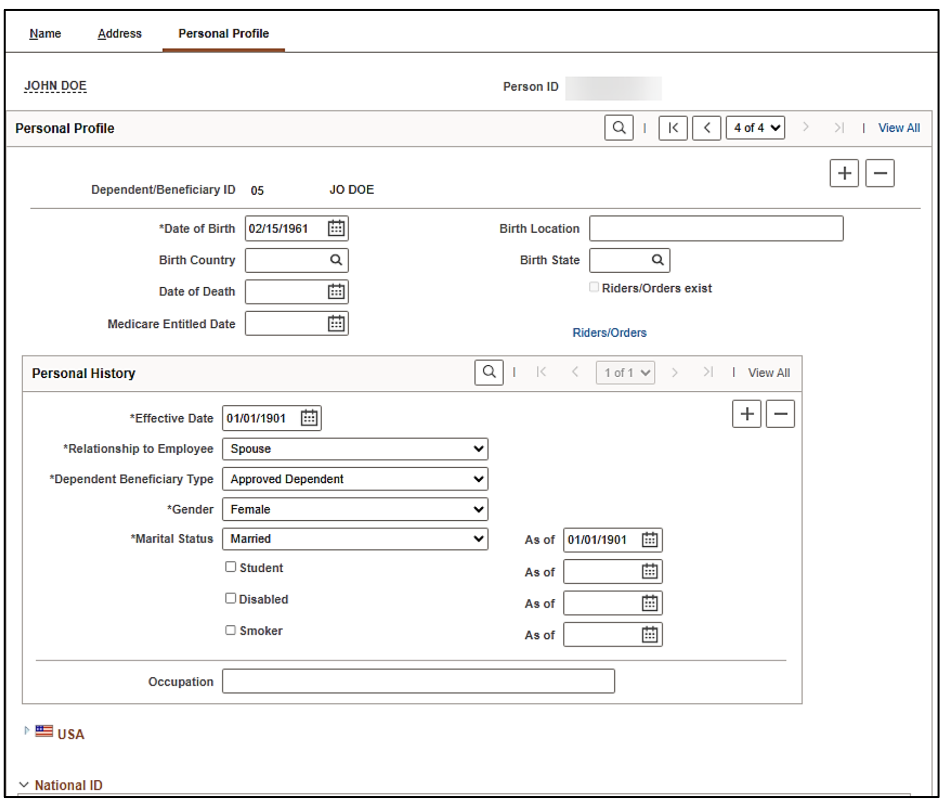
Step	Action
	The **Update Dependent/Beneficiary** page displays for the selected retiree with the **Name** tab displayed by default.

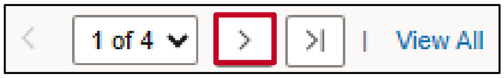
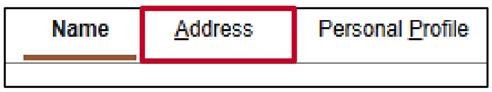
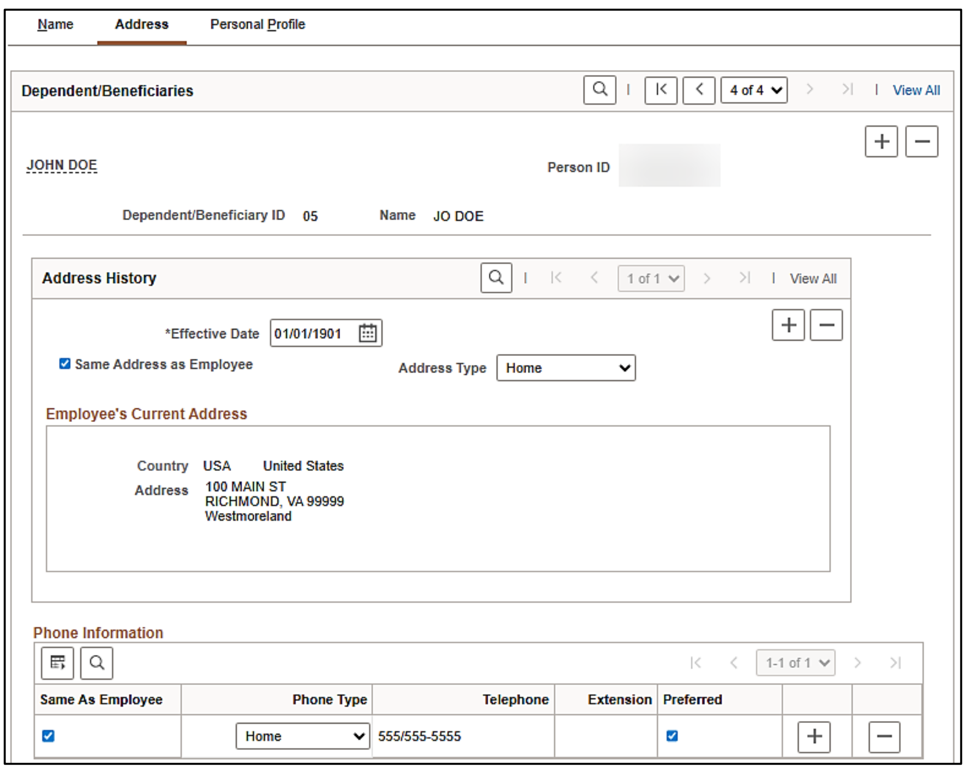


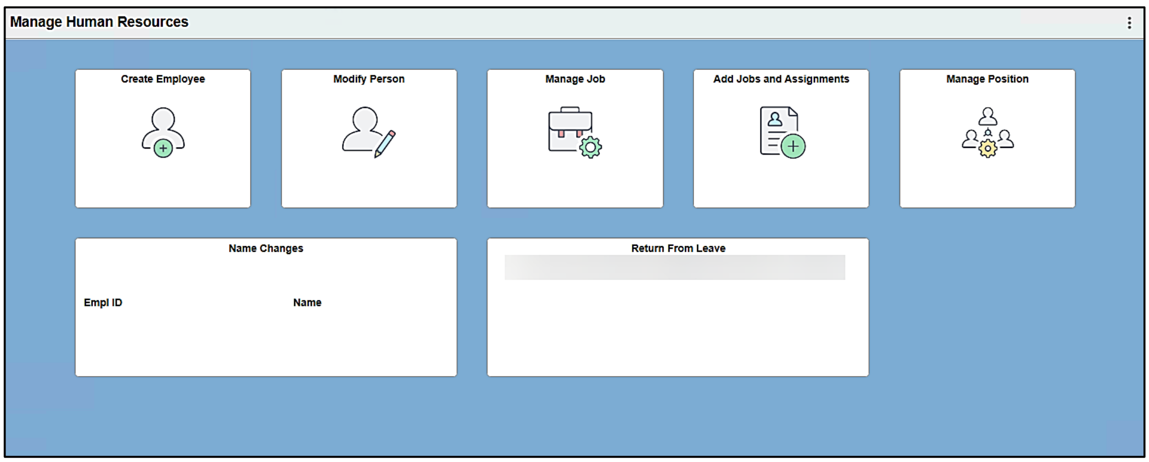
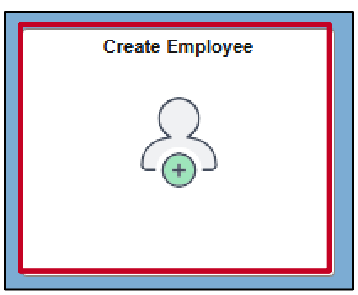
Step	Action
5.	Click the **Personal Profile** tab.

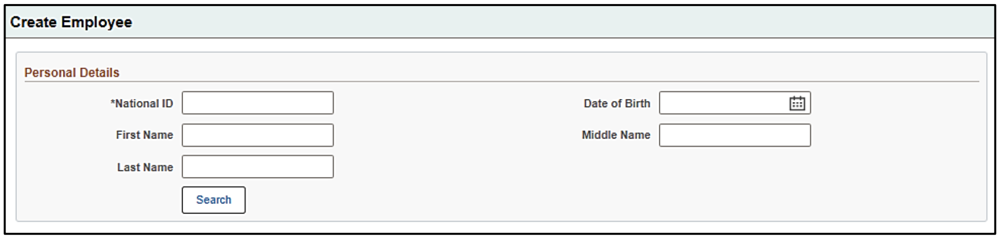
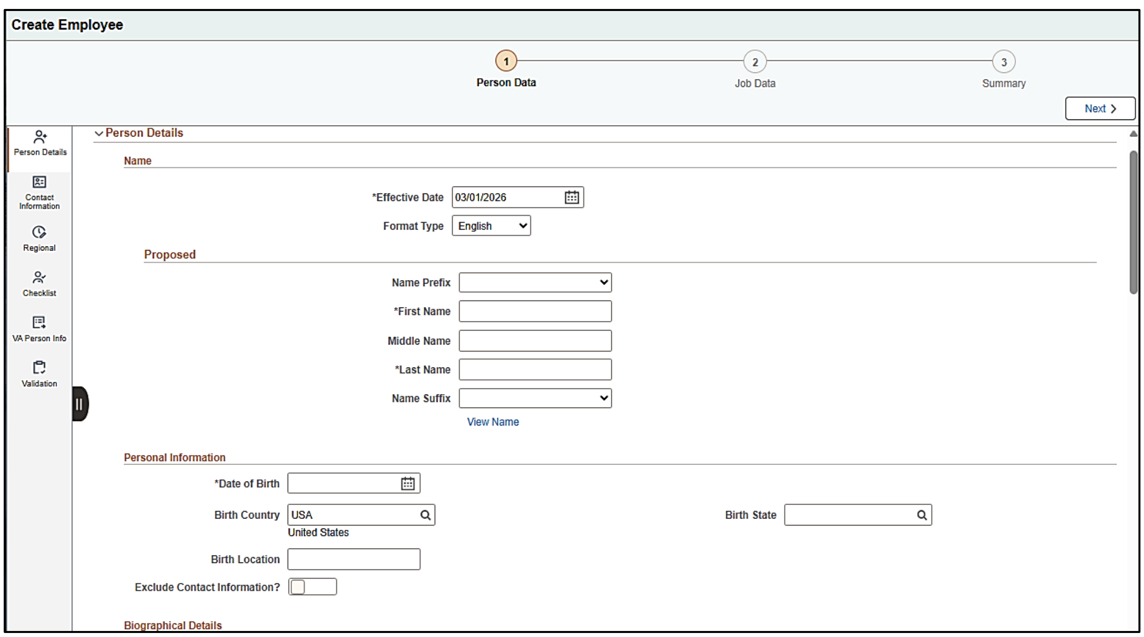
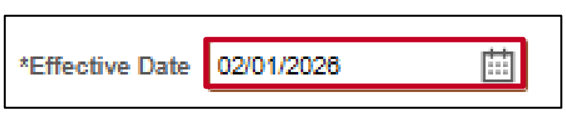


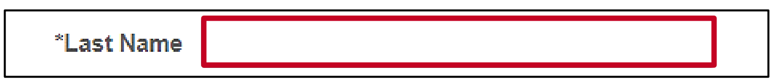
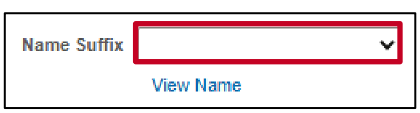
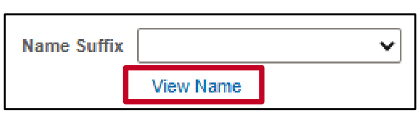
The **Personal Profile** page displays.

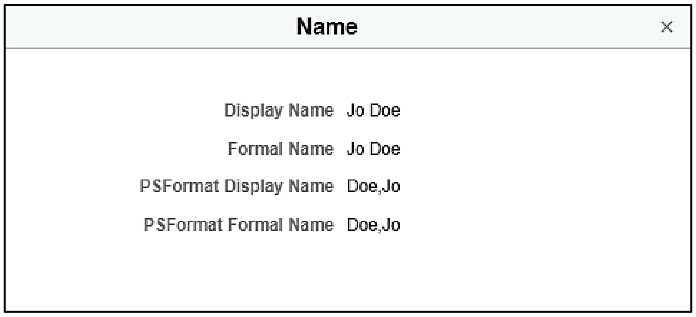
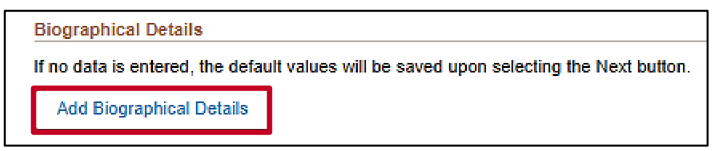
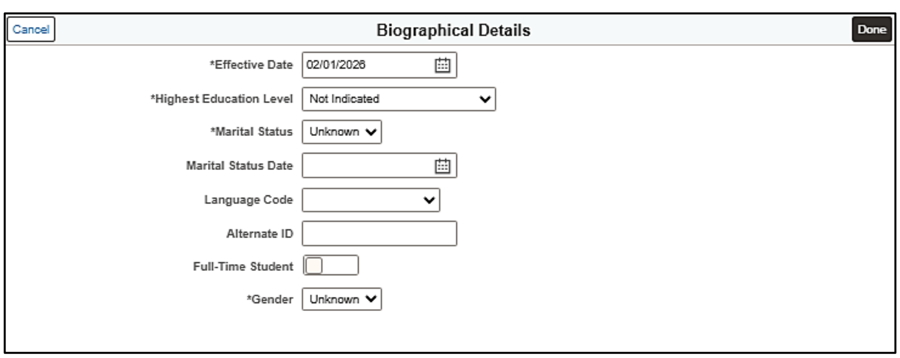


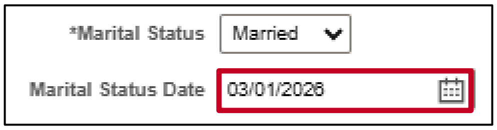
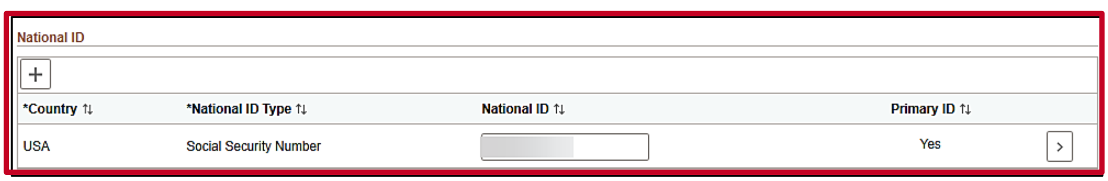
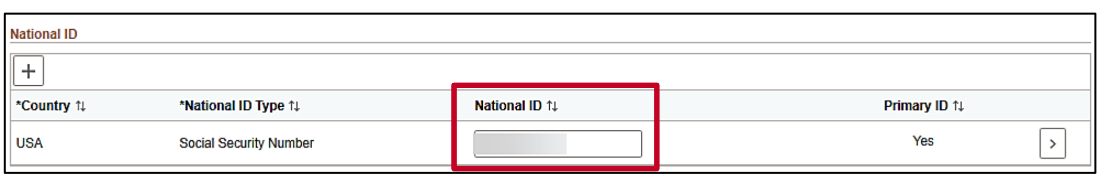
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6.</td><td>Click the Show next row arrow until the Personal Profile for the spouse is reached.
</td></tr>
<tr><td>7.</td><td>Confirm that the information on this page is accurate for the spouse.
Note: This information will be used to hire the dependent (the spouse in this scenario) as an employee.</td></tr>
<tr><td>8.</td><td>Click the Address tab to review the Address information for the spouse.
</td></tr>
<tr><td colspan="2">The Address page for the spouse displays.
</td></tr>
<tr><td>9.</td><td>Confirm that the information on this page is accurate for the spouse.
Note: This information will be used to hire the dependent as an employee (the spouse in this scenario).</td></tr>
</table>

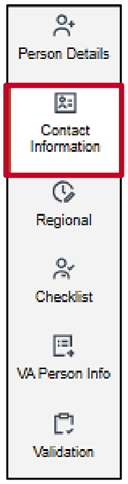
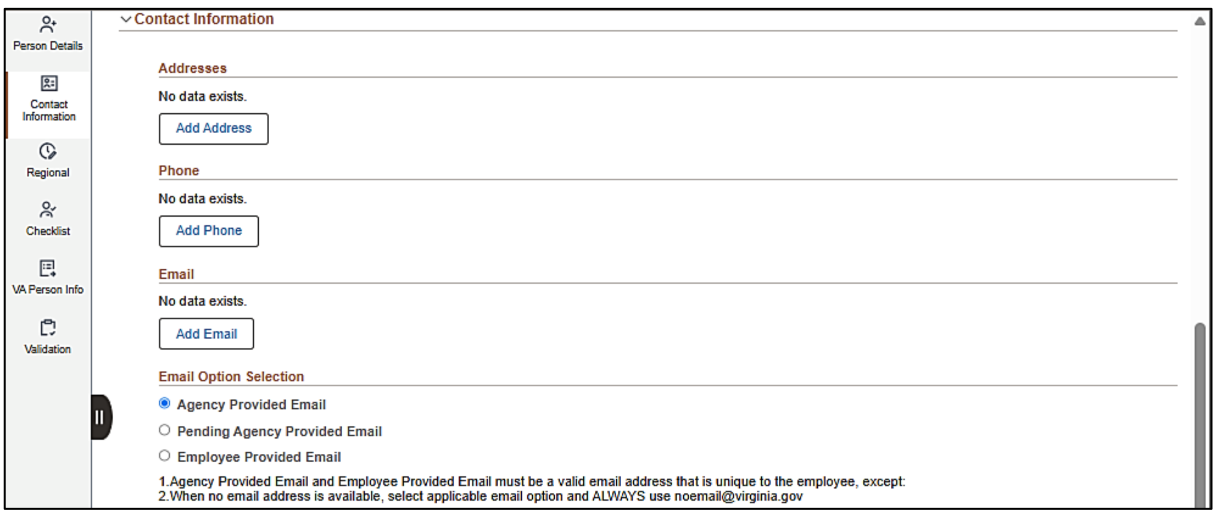
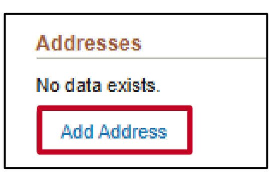
Step	Action
10.	Navigate to the **Create Employee** page by clicking the **Manage Human Resources** tile on the **Cardinal HCM Homepage**. 
The **Manage Human Resources** page displays. 	
11.	Click the **Create Employee** tile. 

Step	Action
The **Create Employee Search** page displays.  	
12.	Enter the dependent's SSN in the **National ID** field. 
13.	Click the **Search** button. 
The **Create Employee** page displays with the **Person Details** tab (**Step 1 of 3: Person Data**) displayed by default.  	
14.	The **Effective Date** field defaults to today's date. Update this date to the applicable date of the new hire (dependent) as needed. 

Step	Action
	The **Effective Date** cannot be greater than today's date when creating or modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
15.	Optionally, click the **Name Prefix** dropdown button and select the applicable prefix. 
16.	Enter the dependent's first name in the **First Name** field (required). 
17.	Optionally, enter the dependent's middle name or middle initial in the **Middle Name** field. 
	Do not add a period behind the middle initial.
18.	Enter the dependent's last name in the **Last Name** field (required). 
	Do not include suffixes (Jr, Sr, or IV) in the **Last Name** field.
19.	Click the **Name Suffix** dropdown button and select the applicable suffix as needed. 
20.	Optionally, click the **View Name** link to view how the name will be displayed. 

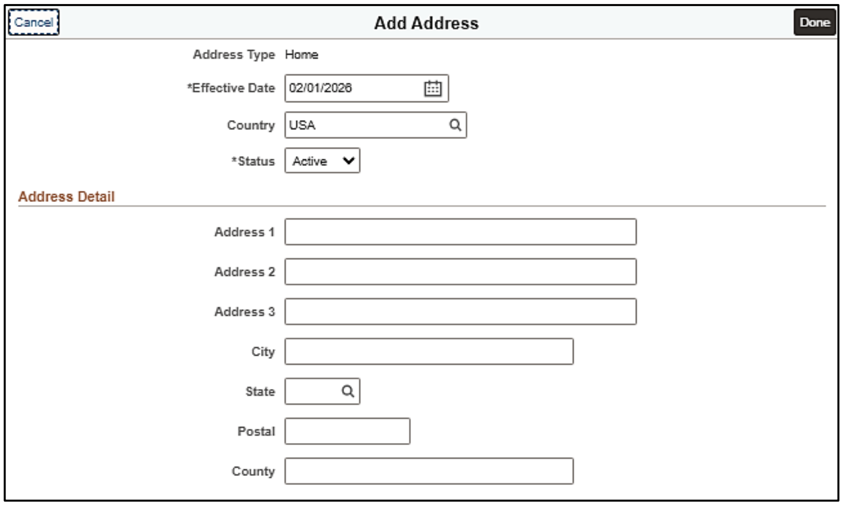
Step	Action
	The **Name** page displays in a pop-up window. **Note**: After reviewing, click the “**X**” button to close the pop-up window and adjust the name fields if needed. 
21.	Scroll down to the **Personal Information** section and click the **Date of Birth Calendar** icon to select the dependent’s date of birth (required). **Note**: The **Birth Country** field defaults to “USA”. This can be updated but is not required as this data is not reported. 
22.	Click the **Add Biographical Details** button. 
	The **Biographical Details** page displays in a pop-up window. 
	The **Effective Date** field within this section defaults to the effective date selected above. Do not change.

Step	Action
23.	Click the **Marital Status** dropdown button and select the dependent's legal marital status. 
	When a selection is made in the **Marital Status** field, the Marital Status Date updates to the Effective Date above. Do not change. 
24.	The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
25.	Click the **Gender** dropdown button and select the dependent's gender. **Note**: This field is a required field for benefits and payroll purposes and must provide the dependent's legal gender. This is not to be confused with the optional **Preferred Gender** field located on the **VA Person** Info section. 
26.	Click the **Done** button. 
27.	Scroll down to the **National ID** section. 
	The **National ID** field auto-populates. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>28.</td><td>Click the Contact Information tab or use the scroll bar to scroll to the Contact Information section.

</td></tr>
<tr><td colspan="2">The Contact Information section displays.

</td></tr>
<tr><td>29.</td><td>Click the Add Adress button in the Addresses section.

</td></tr>
</table>

Step	Action

The **Add Address** page displays in a pop-up window.

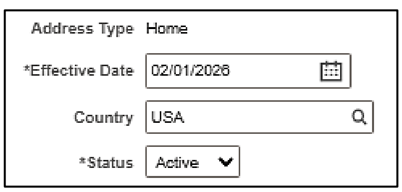


(info)

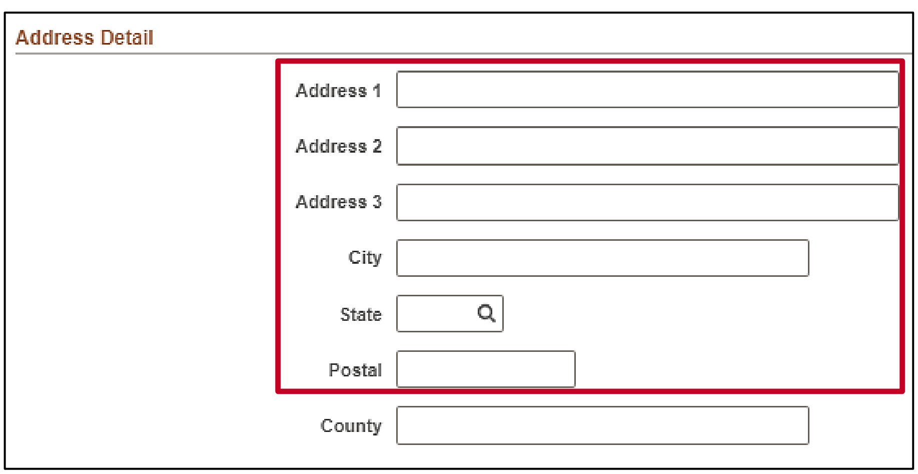
The top section of the **Add Address** page auto-populates. Do not change.

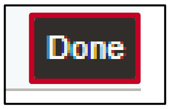
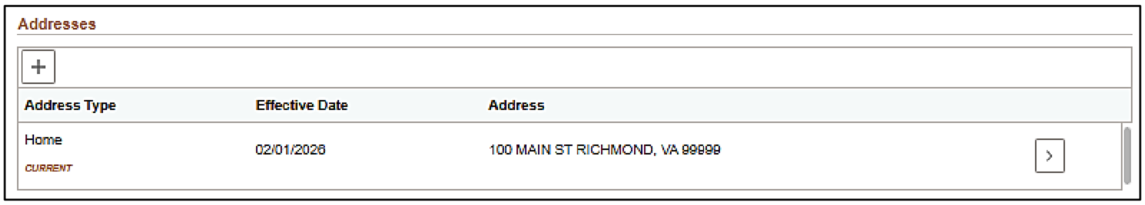
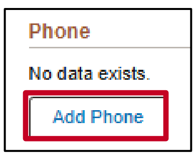
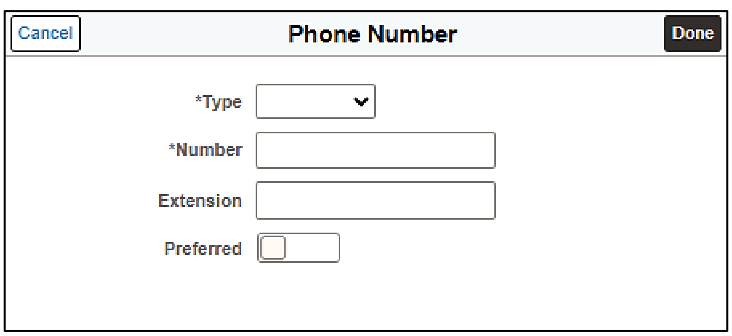
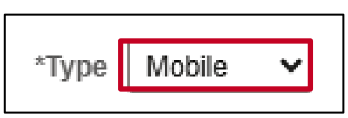
An **Address Type** of “Home” is required for healthcare extract file requirements.

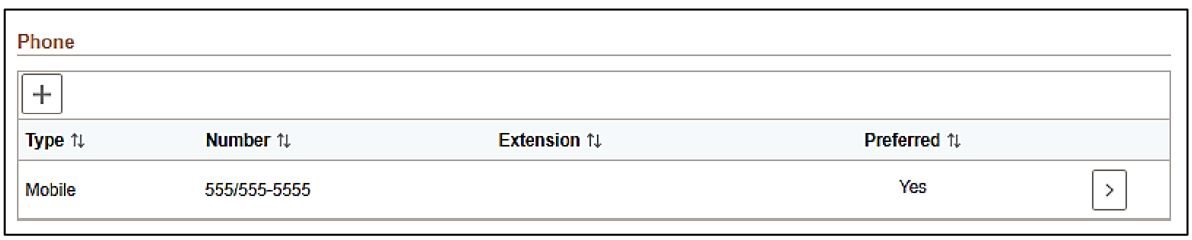
If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information.

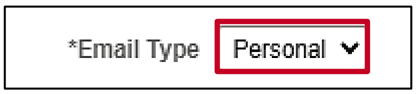
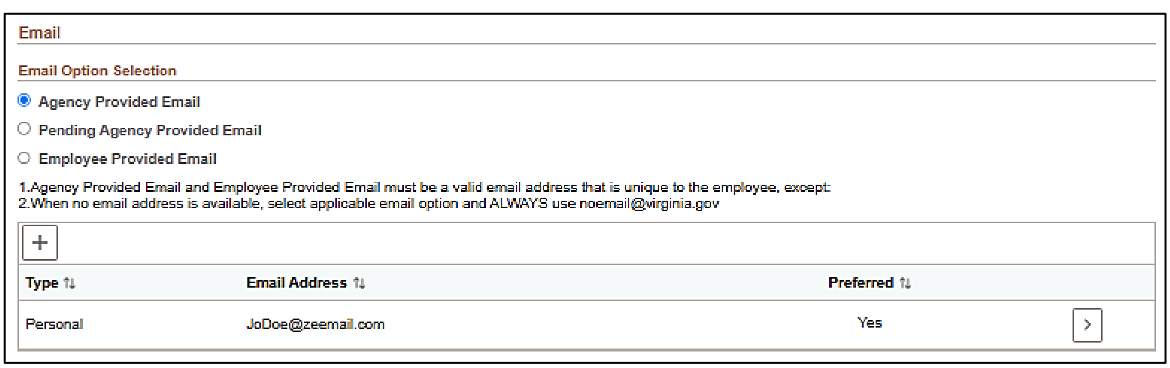


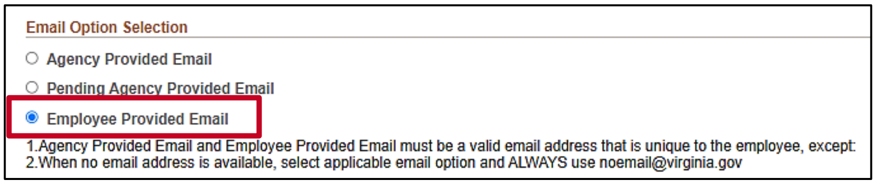
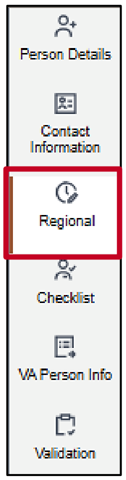
30. Enter the dependent’s address information using the applicable fields in the **Address Detail** section.



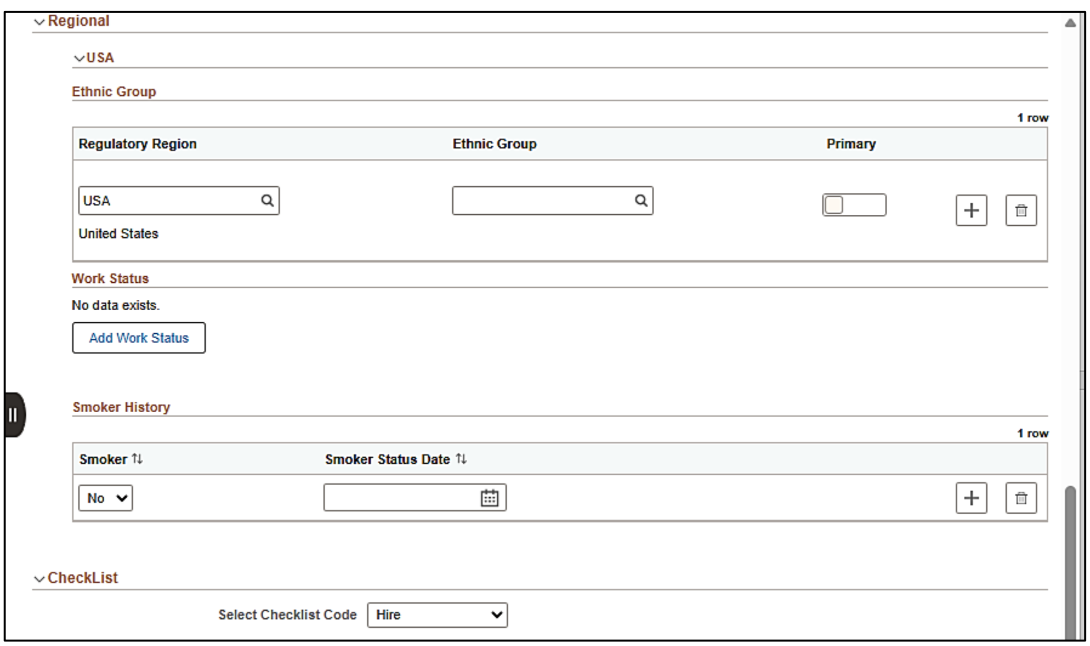
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>The Address 1, City, State, and Postal are required fields. The employee’s personal data cannot be saved if any of these fields are blank.</td></tr>
<tr><td>31.</td><td>Click the Done button once the applicable Address Detail information has been entered.

</td></tr>
<tr><td colspan="2">The Addresses section redisplays.

</td></tr>
<tr><td>32.</td><td>Click the Add Phone button in the Phone section.

</td></tr>
<tr><td colspan="2">The Phone Number page displays in a pop-up window.

</td></tr>
<tr><td>33.</td><td>Click the Type dropdown button and select the type of phone number being entered.

</td></tr>
</table>

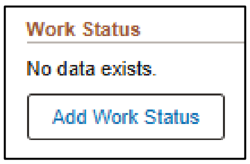
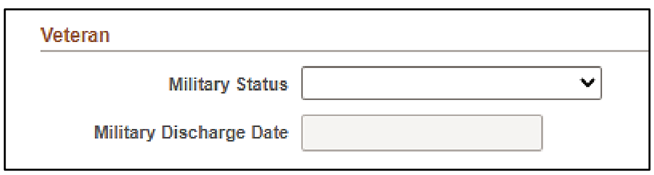
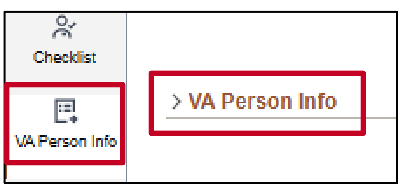
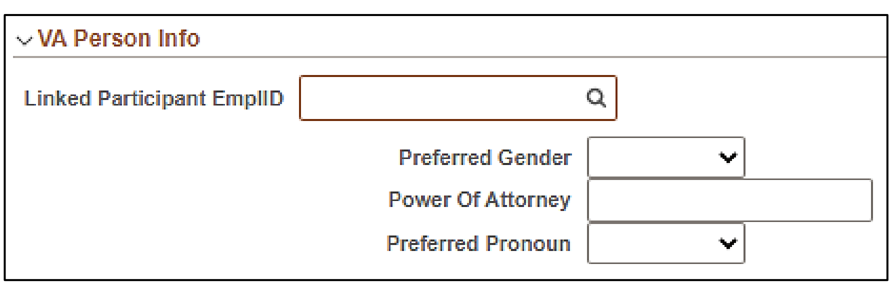
Step	Action
34.	Enter the dependent's phone number in the **Number** field. 
	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.
35.	Select the **Preferred** field toggle to identify the dependent's preferred phone number. 
36.	Click the **Done** button once the Phone Number information has been entered. 
The **Phone** section redisplays. 	
	Additional phone numbers can be added for the dependent as needed by clicking the **Add** button (**+**) and then repeating **Steps 32-36**. 
37.	Click the **Add Email** button in the **Email** section. 

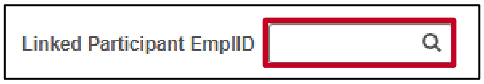
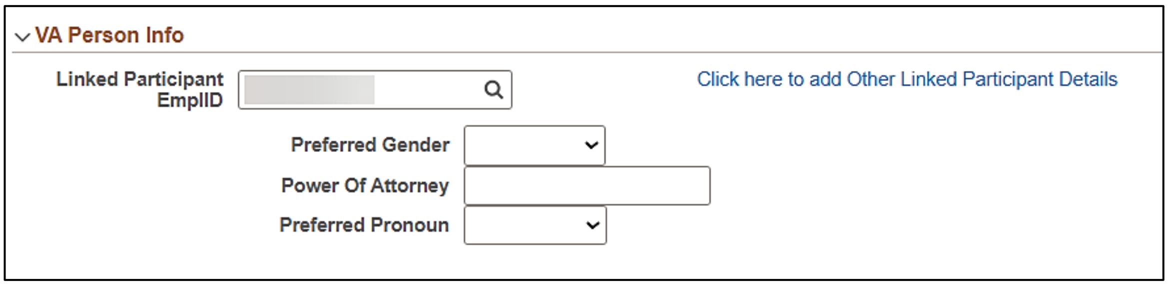
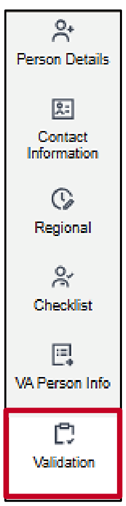
Step	Action
	The **Email Address** page displays in a pop-up window. 
38.	Click the **Email Type** dropdown button and select “Personal”. 
39.	Enter the email address in the **Email Address** field 
	When no email address is available, use **noemail@virginia.gov**. This can be replaced with a personal email address once it is obtained. The personal email address for the dependent must be unique and cannot be the same as the retiree’s email address. The system will display an error upon validation if a duplicate email address is entered.
40.	Click the **Done** button. 
	The **Email** section redisplays. 

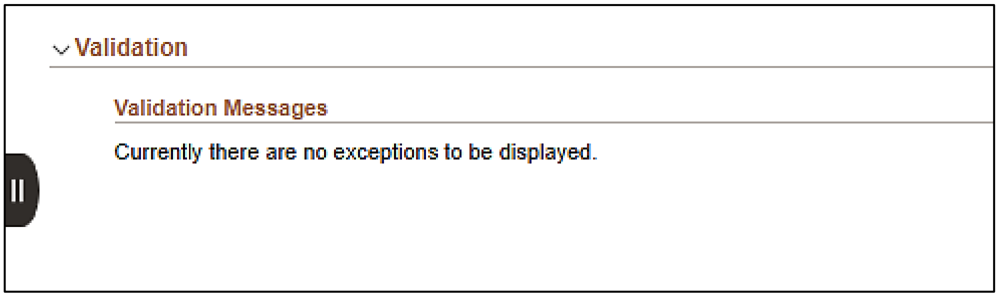
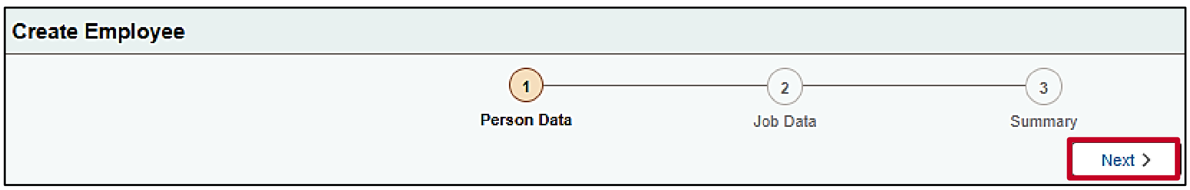
Step	Action
41.	Select the **Employee Provided Email** radio button option in the **Email Option Selection** section. 
42.	Click the **Regional** tab. 

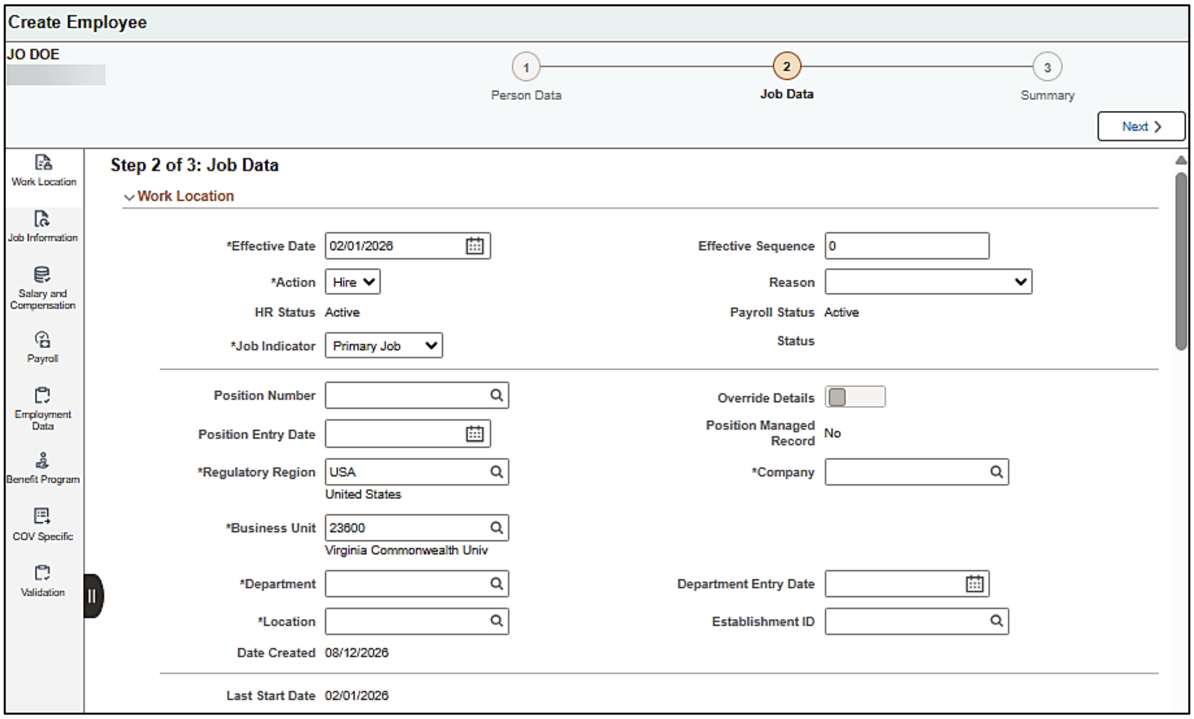
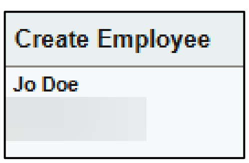
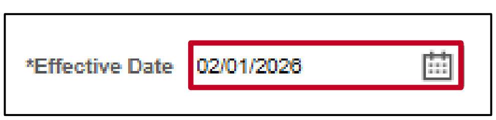
The **Regional** section displays.

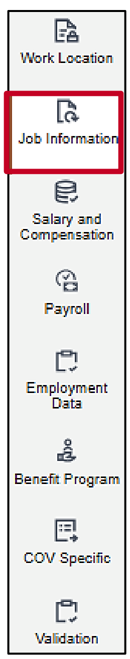


Step	Action
ℹ	The information in the **Regional** section is used for reporting purposes and should be entered if provided. The **Regulatory Region** field defaults to “USA”. Do not change. The **Ethnic Group** field is optional, but can be entered if provided by the dependent. It may also be filled out by the dependent in Employee Self-Service.
43.	Click the **Add Work Status** button in the **Work Status** section. 
ℹ	The **Veteran** section is also optional and can be entered if the dependent provided their military service and service documentation. 
44.	Click the **Done** button. 
45.	Click the **VA Person Info** tab and click the **Expand** button to view the **VA Person Info** section. 
	The **VA Person Info** section displays. 

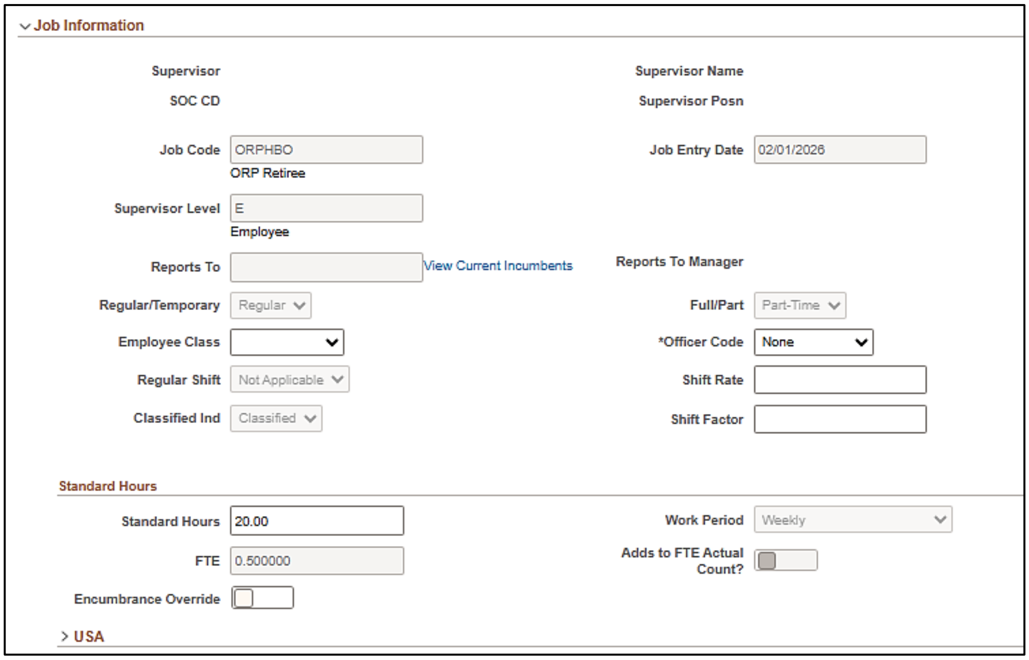
Step	Action
46.	Enter the Employee ID of the employee (the retiree in this scenario) to be linked to the dependent in the **Linked Participant EmplID** field and tab out of the field. 
The **VA Person Info** page redisplays with the **Click here to add Other Linked Participant Details** link displayed. 	
	If more than one dependent needs to be linked, refer to the Job Aid titled **BN361 Linking Dependents and Retirees**, located on the Cardinal website in **Job Aids** under **Learning**.
47.	Click the **Validation** tab. 

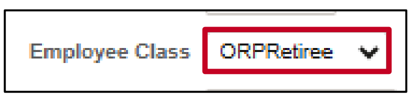
Step	Action
	The **Validation** section displays. 
48.	Click the **Next** button on the right side of the page at the top. 
	This is the step where information entered for the employee's Personal Data is validated. If there is any missing required information, Cardinal will generate an alert. **Note:** Do not click the **Back** button in the browser to go back, as all information that has been entered will be lost. Review the message and go to the sections where the missing information is captured and enter the required information.

Step	Action
The **Create Employee** (**Step 2 of 3: Job Data**) page displays with the **Work Location** tab displayed by default. 	
49.	Cardinal will auto-assign the Employee ID Number for the dependent. Make note of the assigned Employee ID Number for future use. **Note**: This number is located at the top of the page below the dependent's name. 
50.	The **Effective Date** field defaults to the date entered on the **Personal Information** page. Update to the first of the month of eligibility. 
	The **Action** field defaults to "Hire" and no other selections are available. 

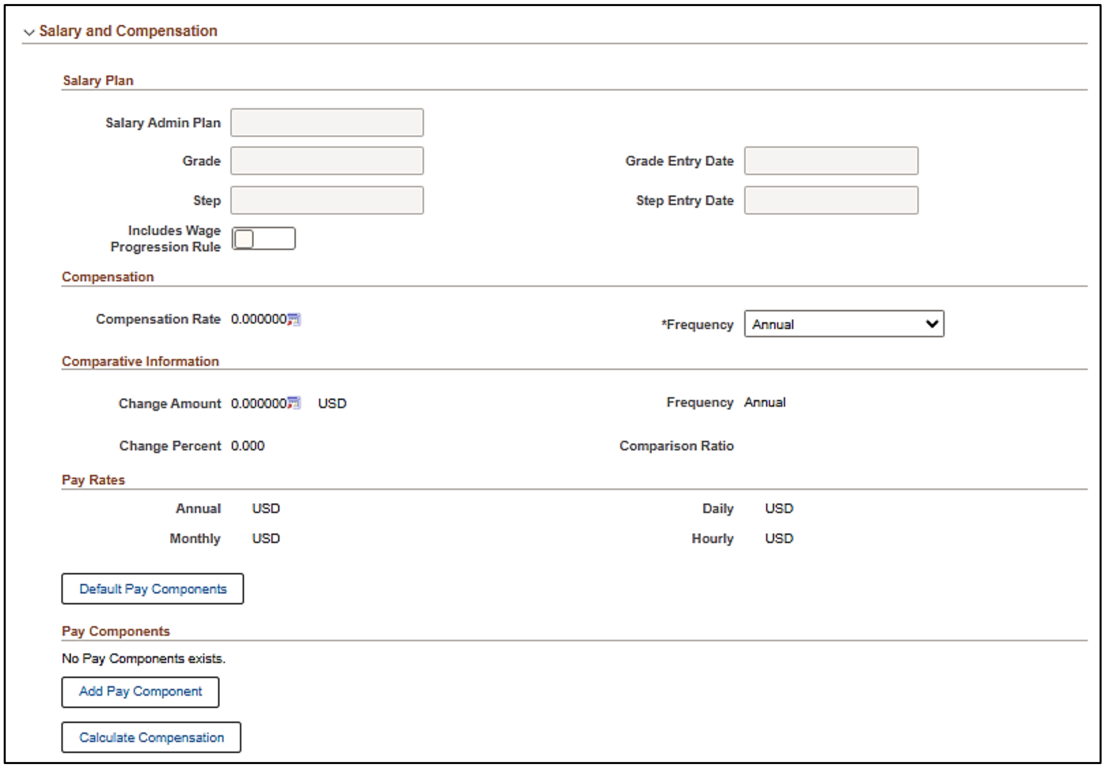
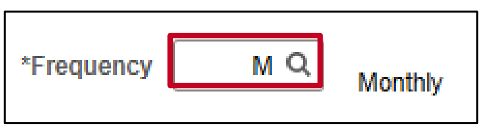
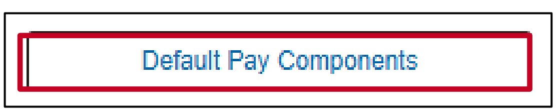
Step	Action
51.	Click the **Reason** dropdown button and select the applicable retiree type. In this example, “Hire ORP Ret” has been selected. 
	Users may see a notification message displayed in a pop-up window. In this case, review the message, confirm the effective date is correct, and then click the **OK** button. 
52.	Enter the retiree Position Number in the **Position Number** field (“Company Code + Retiree Type + 00”). In this example, “VPIORP00” has been selected. 
	The remaining position related fields on this page will auto-populate once the Position Number is entered and tab out of the **Position Number** field.
53.	Click the **Job Information** tab. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Job Information section displays.


</td></tr>
<tr><td>54.</td><td>Click the Employee Class dropdown button and select the applicable Employee Class. In this example “ORPRetiree” has been selected.

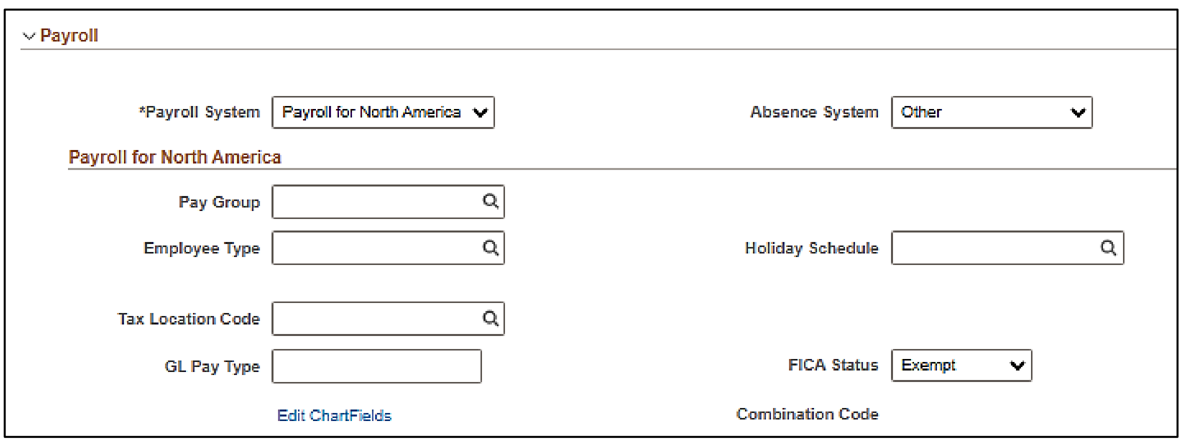

</td></tr>
<tr><td>55.</td><td>Click the Salary and Compensation tab.


</td></tr>
</table>

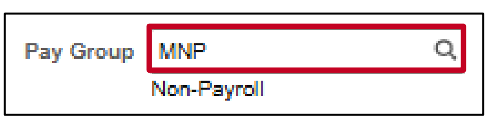
Step	Action
	The **Salary and Compensation** section displays. 
56.	Click the **Frequency Look up** icon and select "M" (Monthly). 
57.	Click the **Default Pay Components** button. 
58.	Click the **Calculate Compensation** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>59.</td><td>Click the Payroll tab.

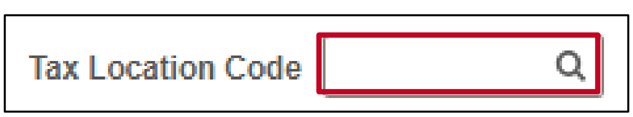
</td></tr>
<tr><td colspan="2">The Payroll section displays.



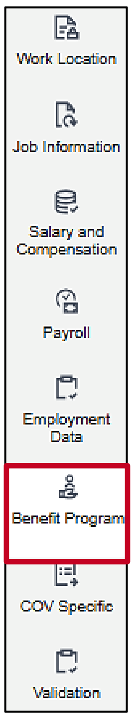
</td></tr>
<tr><td>60.</td><td>Click the Pay Group Look up icon and select “MNP” (Non-Payroll).



</td></tr>
<tr><td>61.</td><td>Enter the applicable Tax Location Code in the Tax Location Code field.

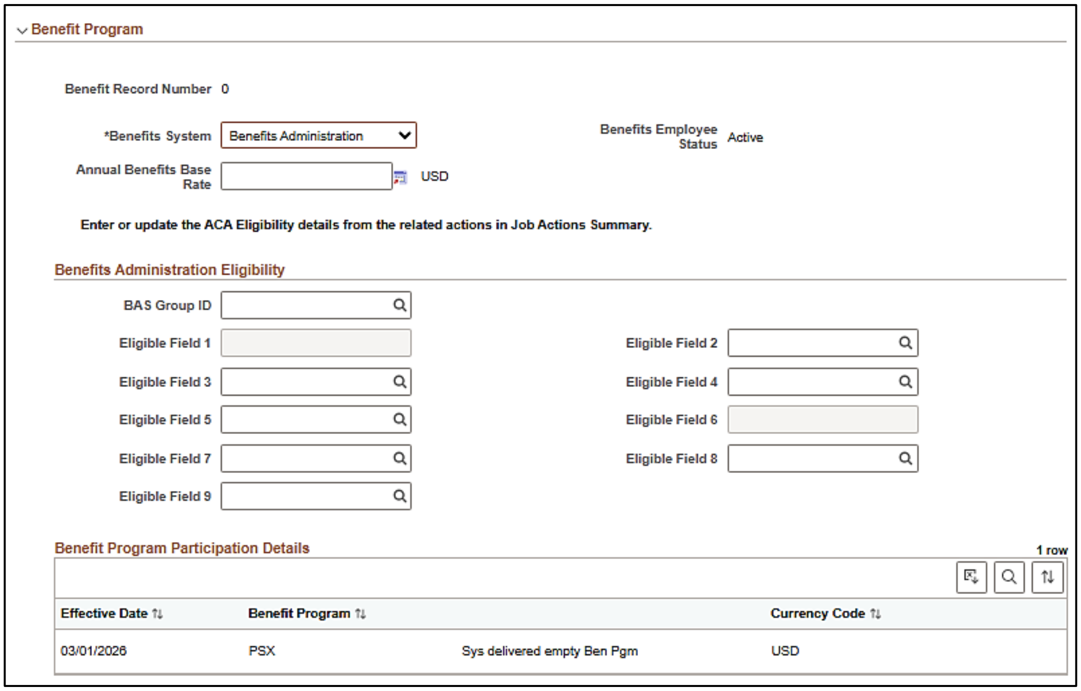


</td></tr>
</table>

Step	Action
	Other fields in the **Payroll for North America** section auto-populate based upon the selected Pay Group. Do not change. 
62.	Click the **Benefit Program** tab. 

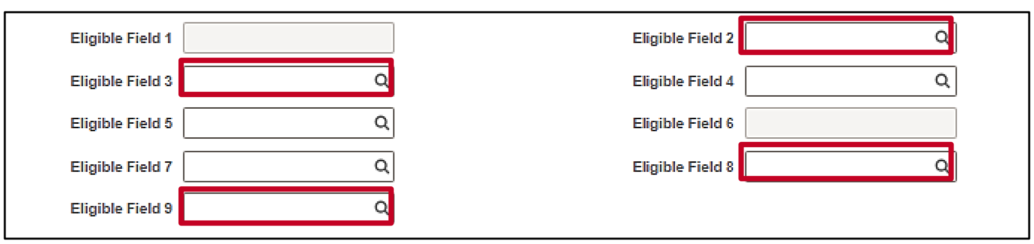
Step	Action

The **Benefit Program** section displays.



63. Scroll down to the **Benefits Administration Eligibility** section and complete the following fields:

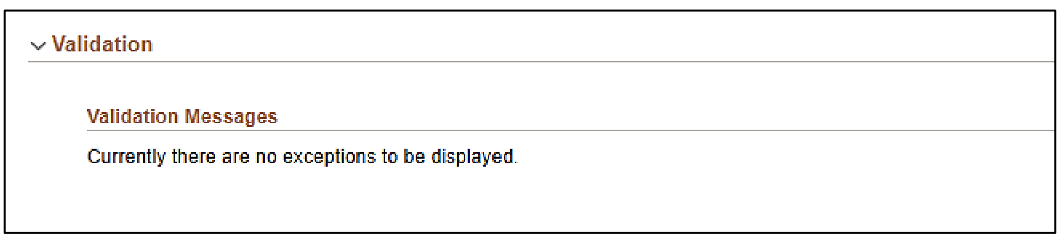
- **Eligible Field 2** (e.g., “007008000” for ORP)
- **Eligible Field 3** (“N”)
- **Eligible Field 8** (“12-12”)
- **Eligible Field 9** (e.g., “LS-GB”)



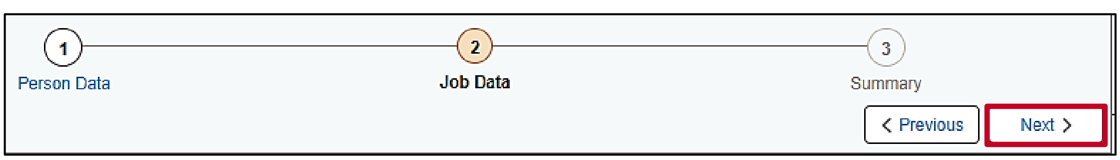
For more information pertaining to Eligible Fields, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields** located on the Cardinal website in **Job Aids** under **Learning**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>64.</td><td>Click the Validation tab.

</td></tr>
<tr><td colspan="2">The Validation section displays.



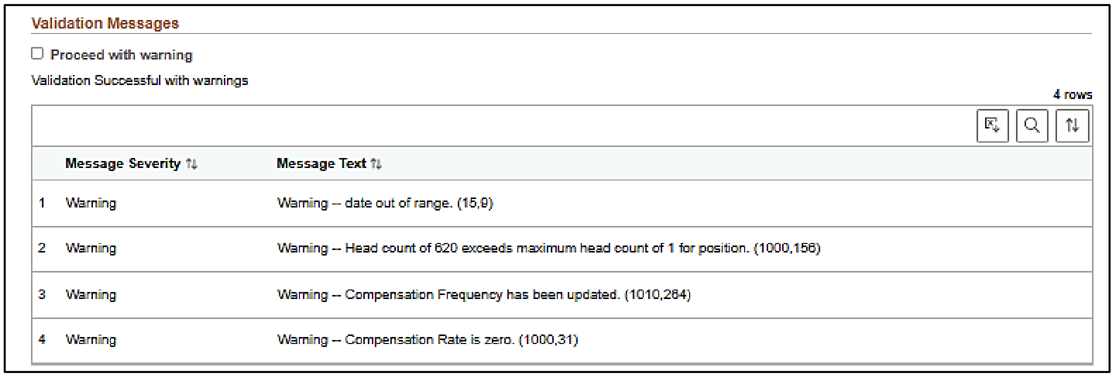
</td></tr>
<tr><td>65.</td><td>Click the Next button.



</td></tr>
</table>

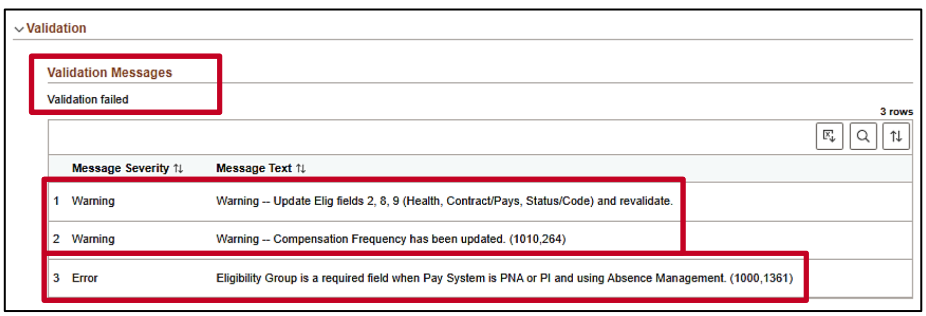
Step	Action

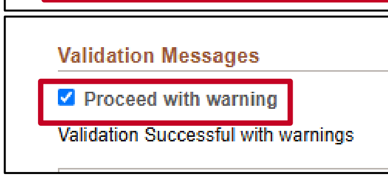
The **Validation Messages** section displays.

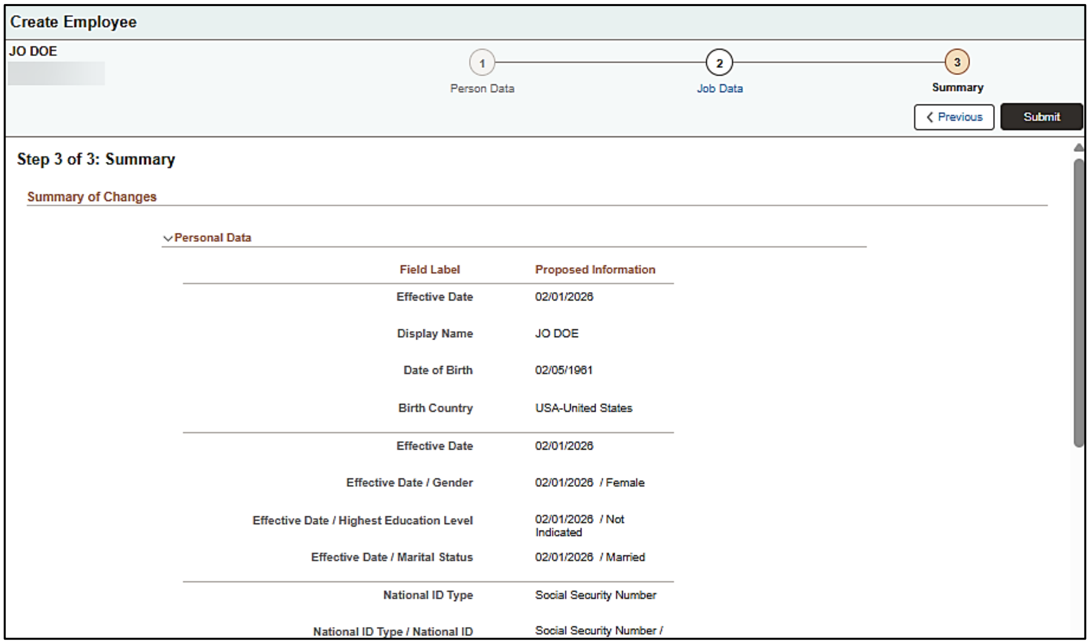
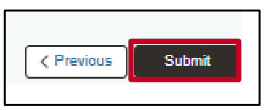
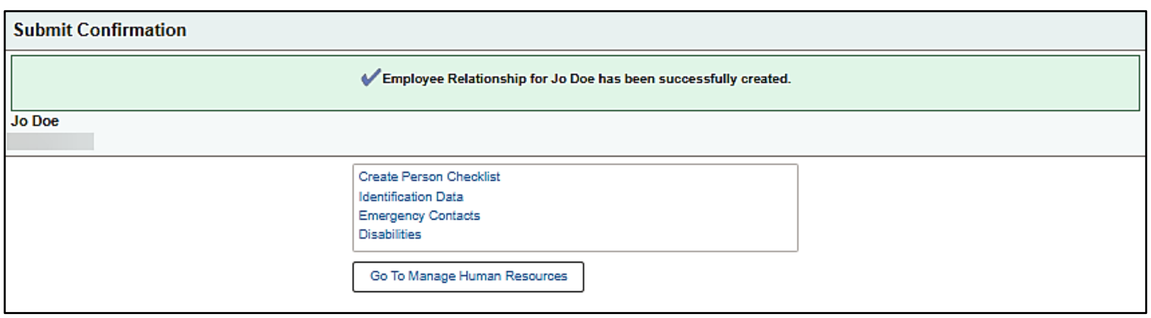


66. Review the **Validation Messages** section and click the **Next** button.

Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting (the **Validation Messages** section will display an **Error** message and the validation will fail). Select the **Proceed with warning** checkbox option if applicable.

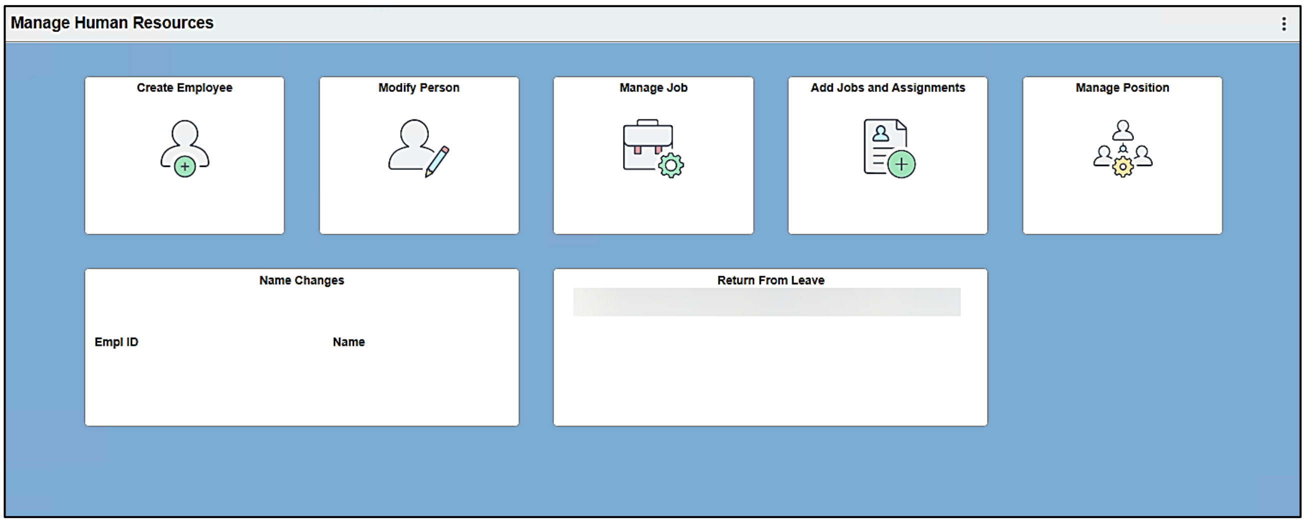


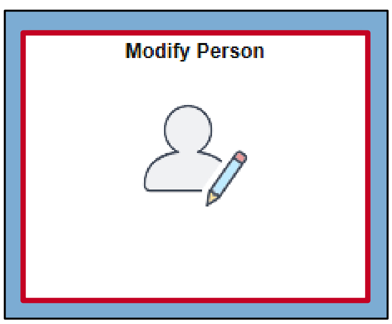


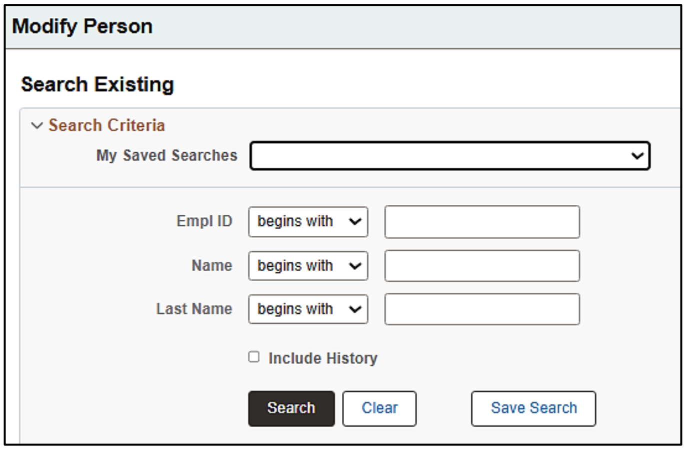
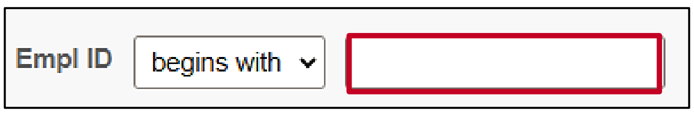
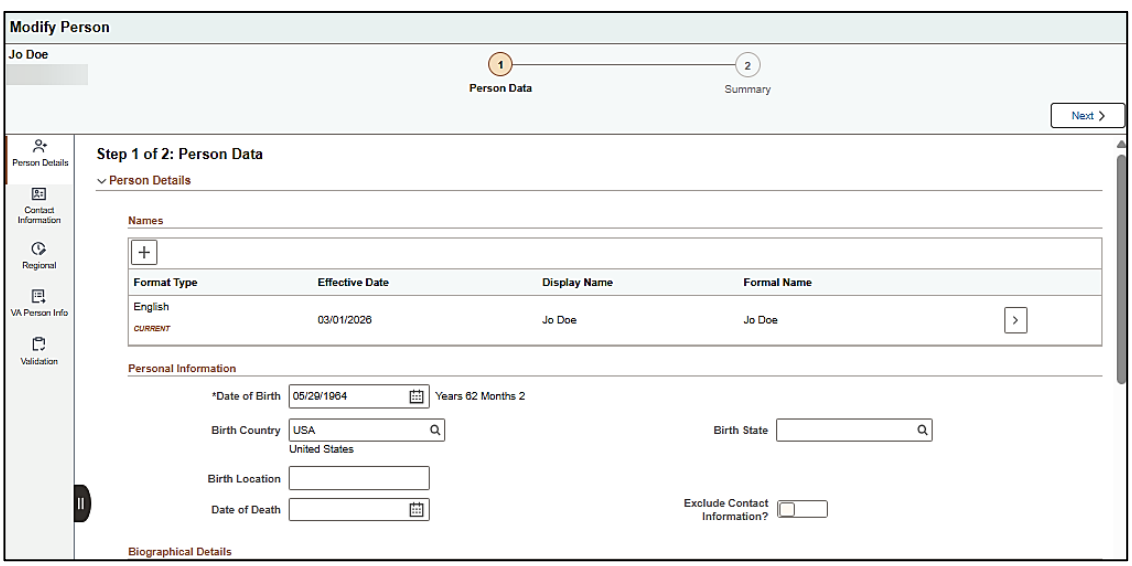
Step	Action
The **Create Employee Step 3 of 3: Summary** page displays. 	
67.	Review the **Summary of Changes** section, and then click the **Submit** button. 
The **Submit Confirmation** page displays. 	
	As a reminder, Cardinal has auto assigned the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for the next steps.

Step	Action
68.	Click the **Go To Manage Human Resources** link on the **Submit Confirmation** page. 

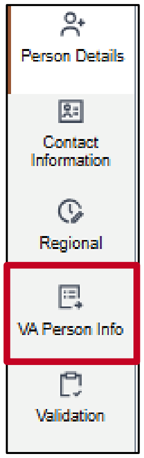
The **Manage Human Resources** page displays.



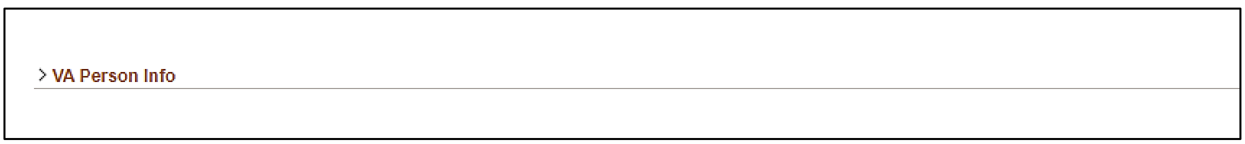
Step	Action
69.	Click the **Modify Person** tile. 

Step	Action
The **Modify Person Search Existing** page displays. 	
70.	Enter the Employee ID for the dependent in the **Empl ID** field. 
71.	Click the **Search** button. 
The **Modify Person** page displays, **Step 1 of 2: Person Data**, with the **Person Details** tab displayed by default. 	

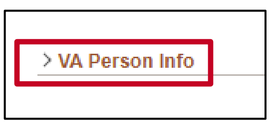
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>72.</td><td>Click the VA Person Info tab.



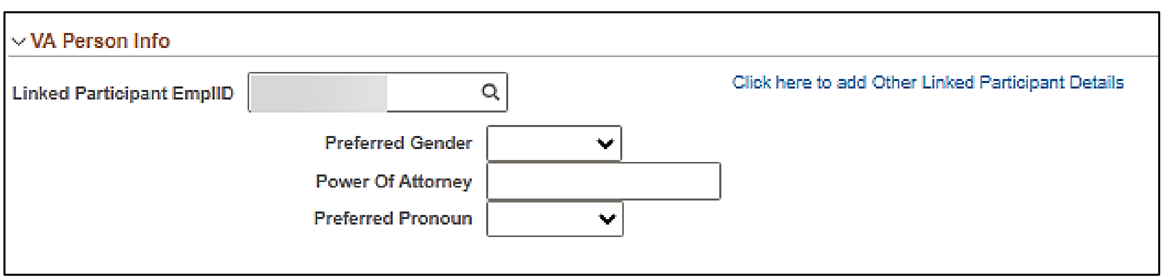
</td></tr>
<tr><td colspan="2">The VA Person Info section displays.



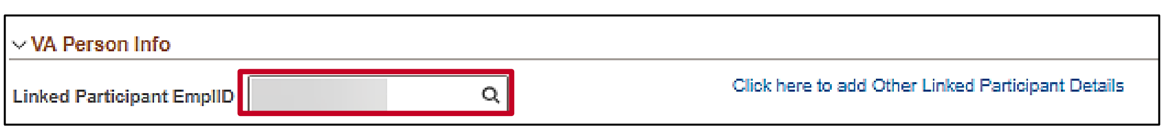
</td></tr>
<tr><td>73.</td><td>Click the VA Person Info link to expand the section.



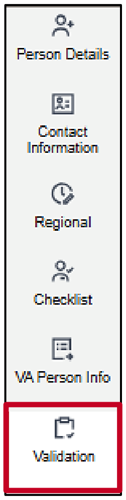
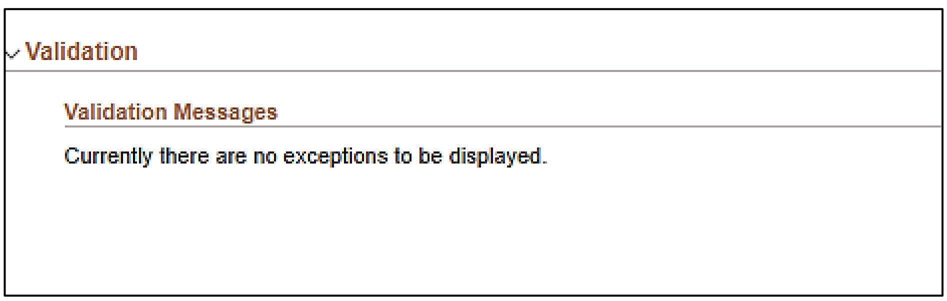
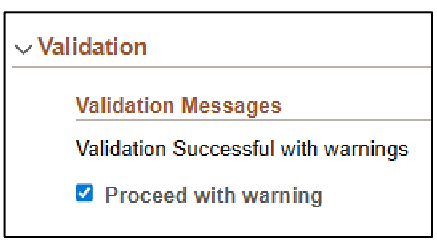
</td></tr>
<tr><td colspan="2">The VA Person Info section expands to show all the fields in this section.

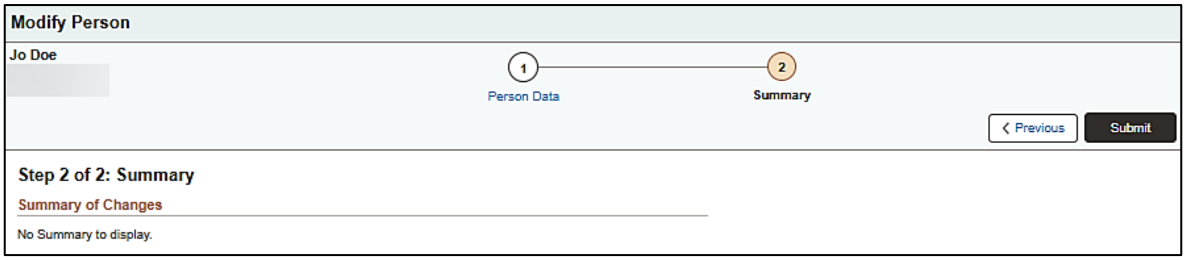
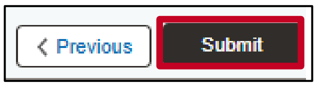
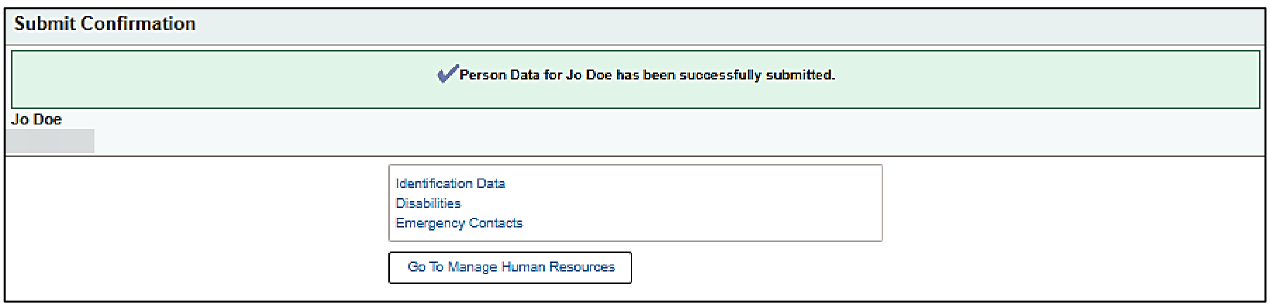


</td></tr>
<tr><td>74.</td><td>Validate that the retiree’s Employee ID is populated in the Linked Participant EmplID field. If not, enter the retiree’s Employee ID.



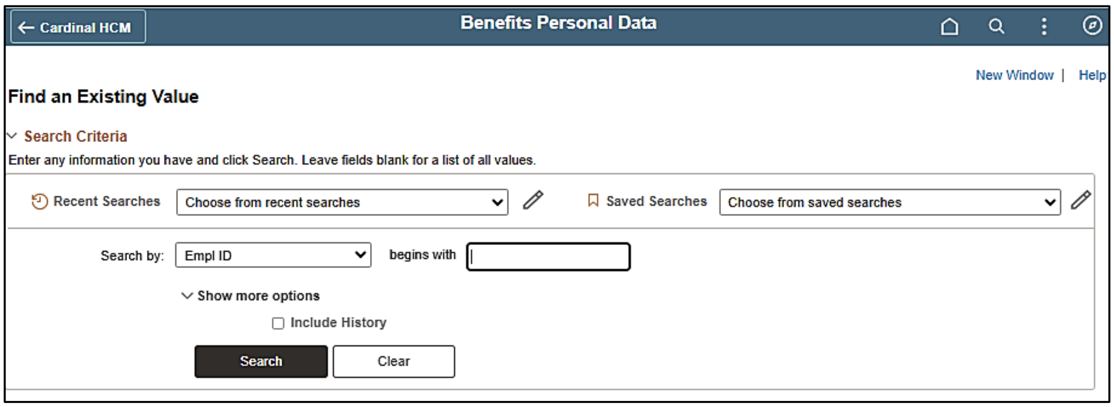
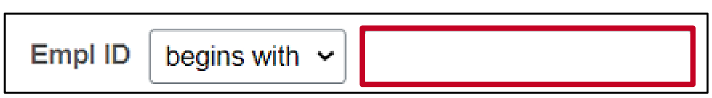
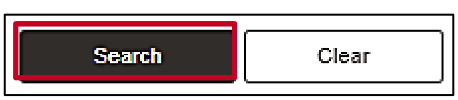
</td></tr>
</table>

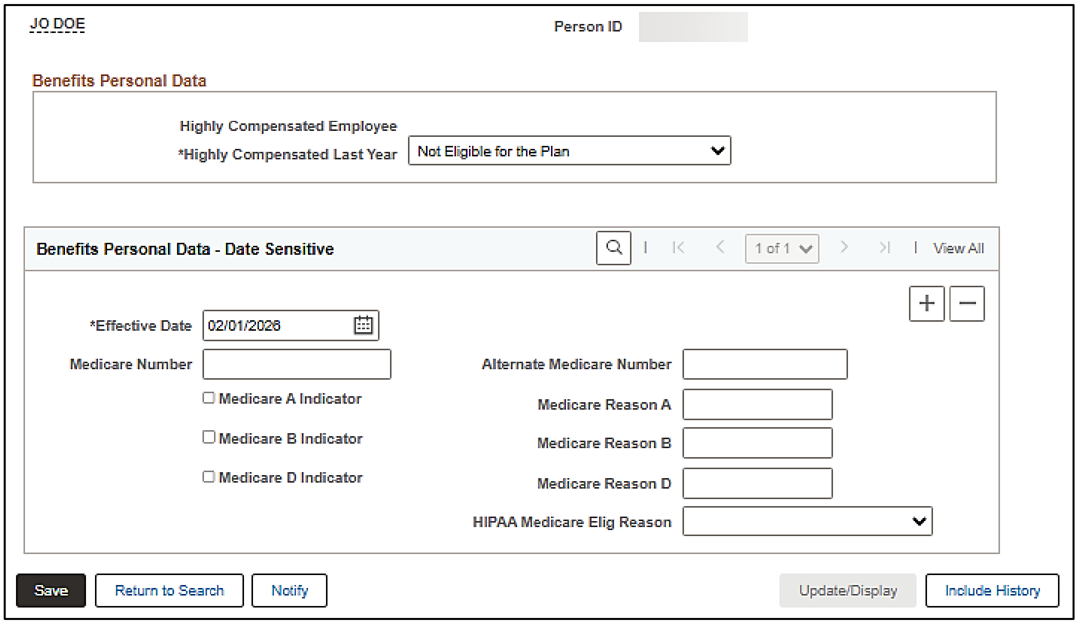
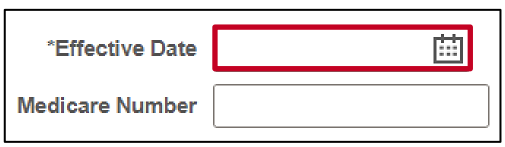
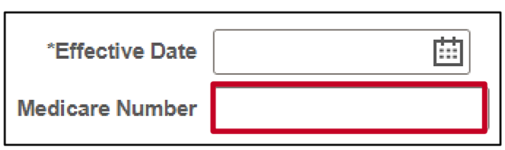
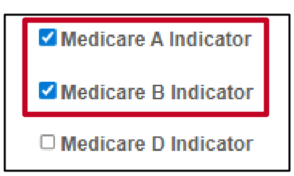
Step	Action
75.	Click the **Validation** tab. 
The **Validation** section displays.  	
	Validation messages may appear that include warnings and errors. If a **Validation warning** message appears, review the warning and make updates as needed or proceed with warning. **Error** messages must be addressed prior to saving. 
76.	Click the **Next** button. 

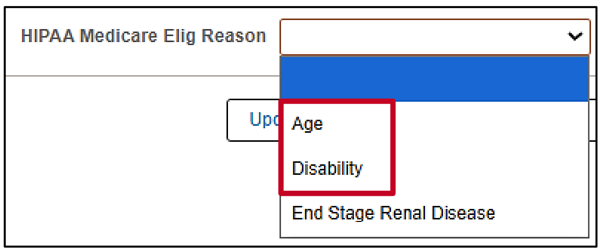
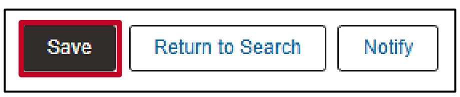
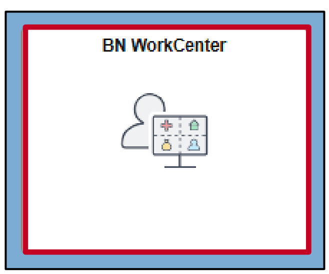
Step	Action
	The **Modify Person Step 2 of 2: Summary** page displays the **Summary of Changes**. 
77.	Click the **Submit** button. 
	The **Submit Confirmation** page displays. 

The Benefits Personal Data Page

Before enrolling the spouse in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

Step	Action
1.	Navigate to the **Benefits Personal Data** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Benefits Personal Data**
	The **Benefits Personal Data Find an Existing Value Search** page displays. 
i	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**.
2.	Enter the spouse's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. 
3.	Click the **Search** button. 

Step	Action
	The **Benefits Personal Data** page displays for the spouse. 
4.	Click the **Effective Date Calendar** icon in the **Benefits Personal Data – Date Sensitive** section and select the first day of the month in which the spouse is Medicare eligible. 
	The **Medicare Number** field will be entered by the Agency BA when received, and dashes are not accepted in the field. **Note**: Prescription coverage may be delayed until the Medicare Number is provided. 
5.	Select both the **Medicare A Indicator** and the **Medicare B Indicator** checkbox options. **Note**: The **Medicare D Indicator** is not used in Cardinal and should not be selected. 

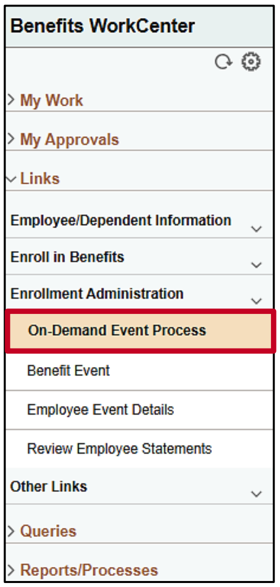
Step	Action
	For End Stage Renal Disease, the **Medicare A**, **B**, and/or **D Indicator** checkbox options will not be checked. OHB is establishing the record for End Stage Renal Disease (ESRD).
6.	Click the **HIPAA Medicare Elig Reason** dropdown button and select either “Age” or “Disability” as the applicable HIPPA Medicare eligibility reason. **Note**: The HIPAA Medicare eligibility reason of “End Stage Renal Disease” is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary. 
7.	Click the **Save** button. 
8.	Click the **Home** button in the top right corner of the page to return to the Cardinal HCM Homepage, and then click the **BN WorkCenter** tile to navigate to the **On-Demand Event Process** page.  

Enroll the Spouse in Medicare

Once the spouse has been hired into Cardinal and linked with the retiree, and Benefits Personal Data has been updated, the spouse is now eligible for Medicare benefit enrollment. The Agency BA will now navigate to the **On-Demand Event Process** page and process the New Hire (HIR) benefit event for the spouse to enroll the spouse in Medicare.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>

Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > On-Demand Event Process**



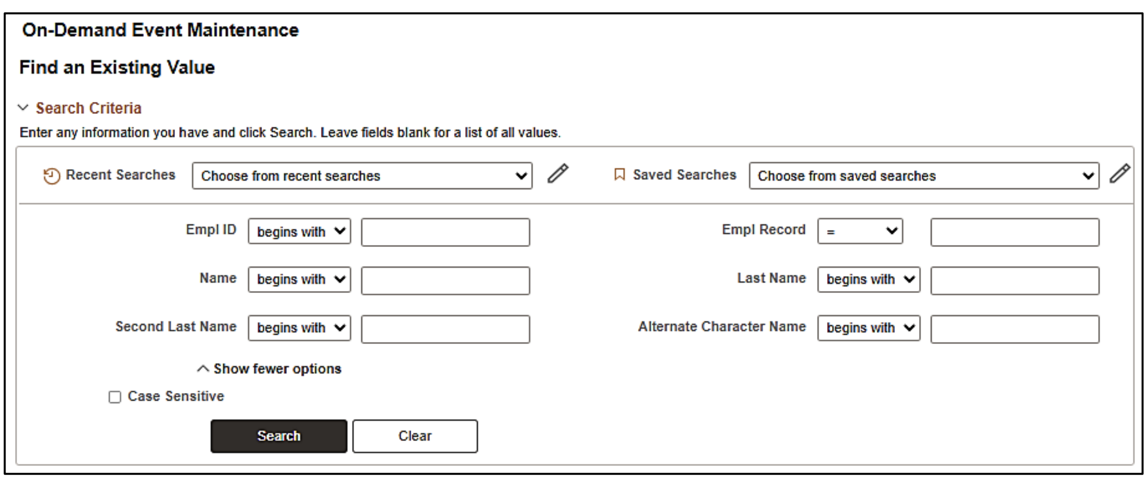
</td></tr>
<tr><td></td><td>

Users can also navigate to the **On-Demand Event Process** page using the following path:

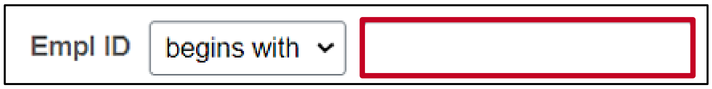
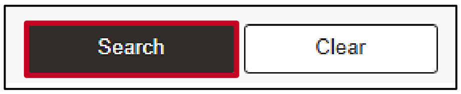
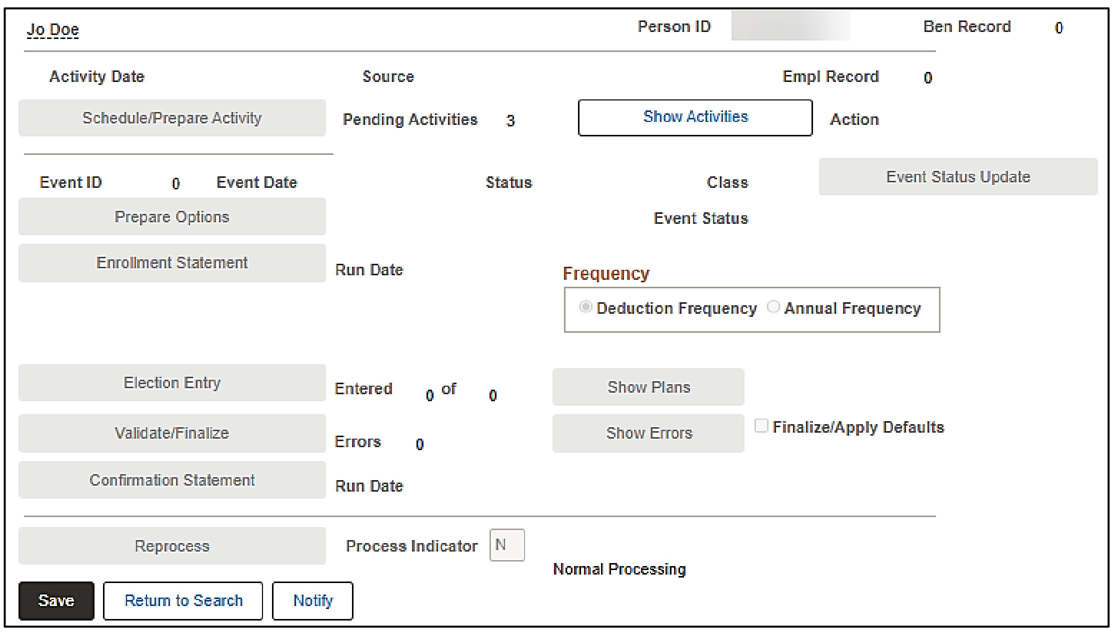
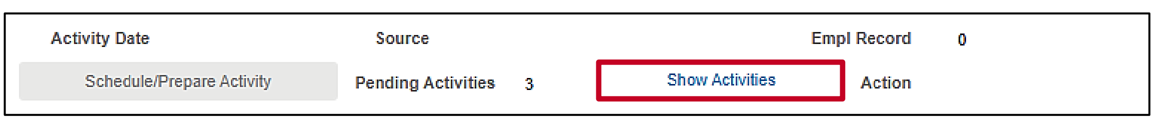
NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

</td></tr>
<tr><td colspan="2">

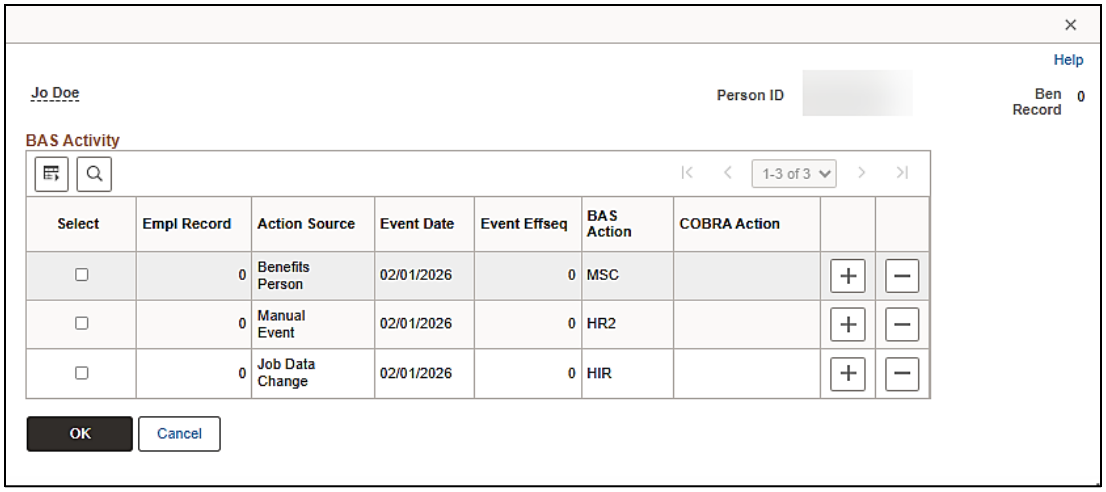
The **On-Demand Event Maintenance Find an Existing Value Search** page displays.



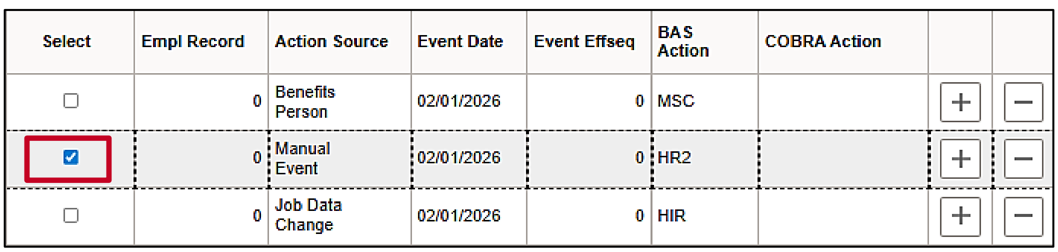
</td></tr>
</table>

Step	Action
2.	Enter the spouse's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. 
3.	Click the **Search** button. 
The **On-Demand Event Process** page displays. 	
4.	Click the **Show Activities** button. 

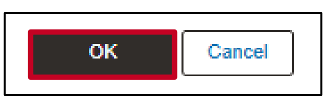
Step	Action
	The **BAS Activity** page displays in a pop-up window.



	Benefits Personal Data may trigger an “MSC” event. Events should be processed in the following order: “HR2”, “HIR”, and the “MSC” event last.
5.	Click the **Select** checkbox option for the “HR2” Benefit Event.

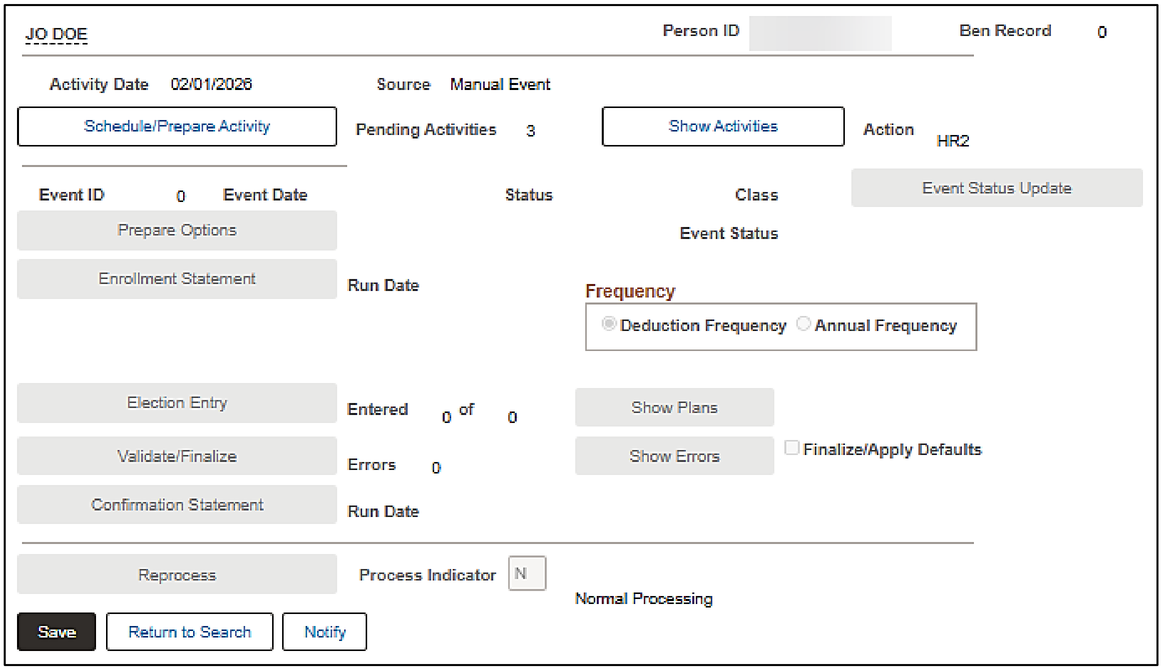


6.	Click the **OK** button.



Step	Action

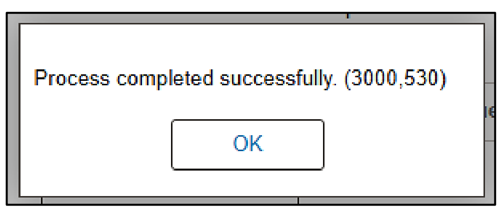
The **On-Demand Event Process** page redisplays.



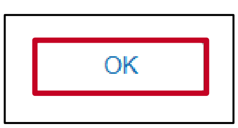
7. Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event.

This will process and close the HR2 Benefit Event.

A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.

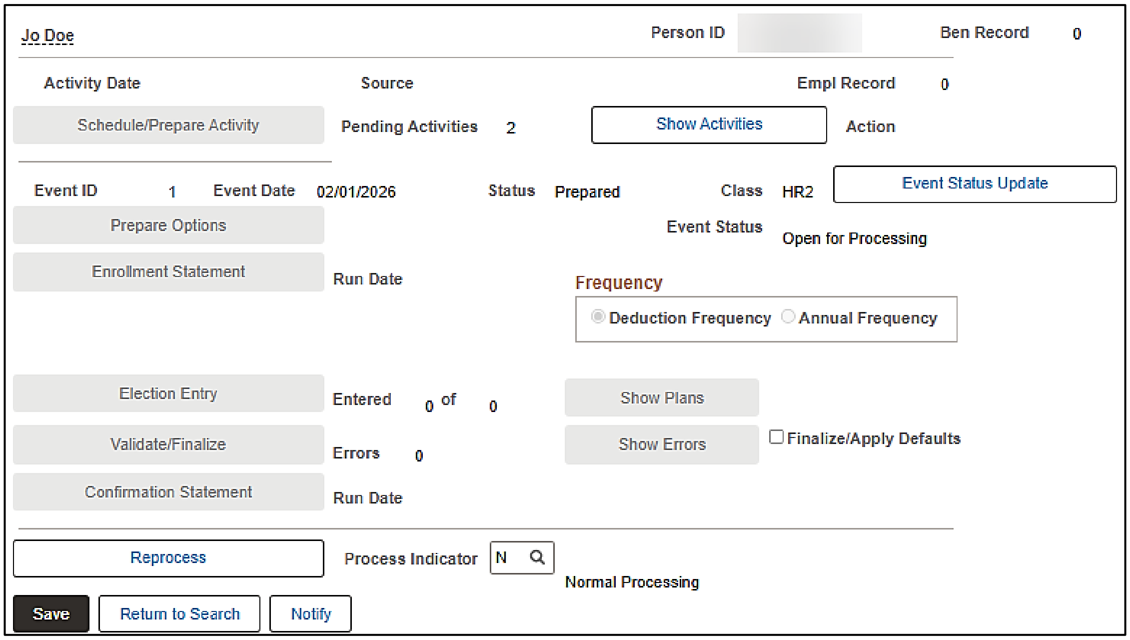


8. Click the **OK** button to close the message.



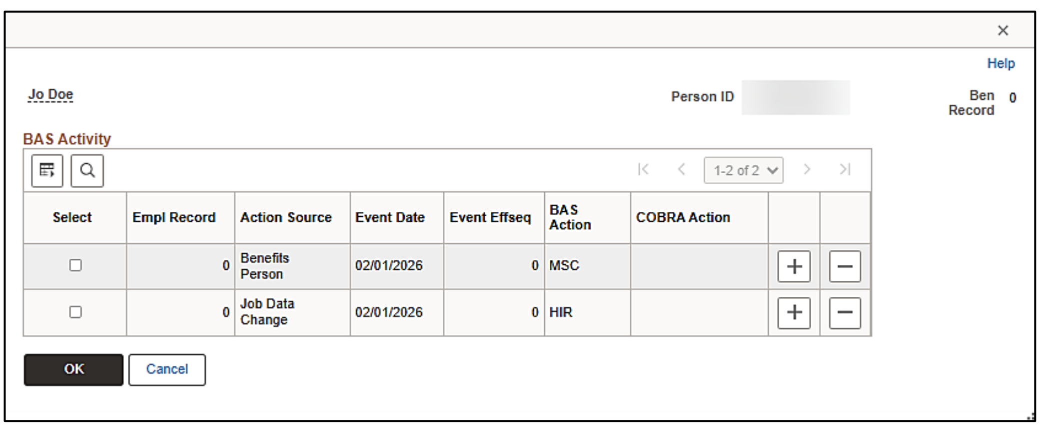
Step	Action

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



9. Click the **Show Activities** button.

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

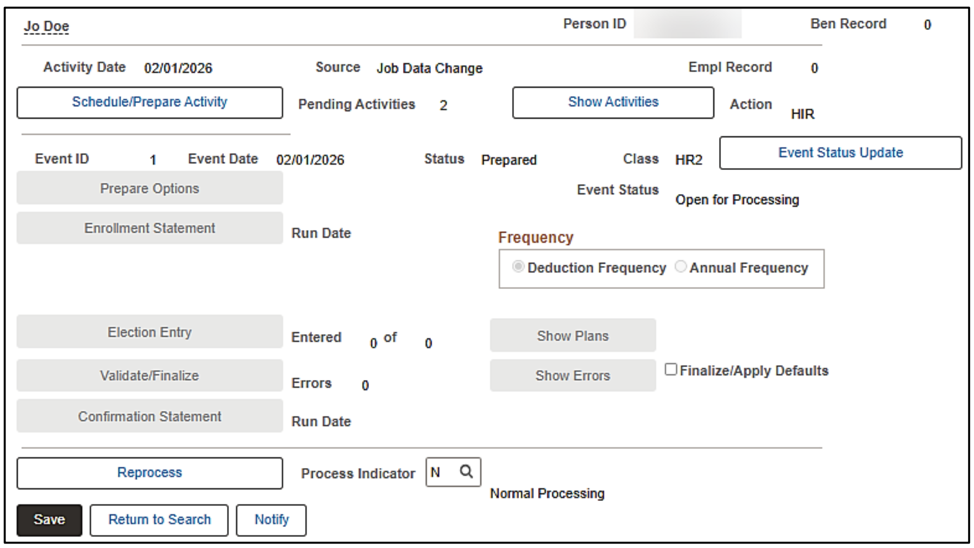


Step	Action
10.	Click the **Select** checkbox option for the "HIR" Benefit Event.

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☐	0	Benefits Person	02/01/2026	0	MSC		+	−
☑	0	Job Data Change	02/01/2026	0	HIR		+	−

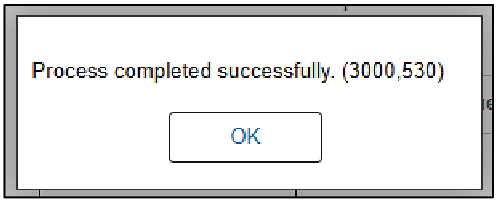
Step	Action
11.	Click the **OK** button.

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

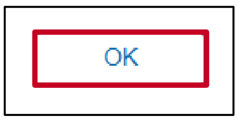


Step	Action
12.	Click the **Schedule/Prepare Activity** button. Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

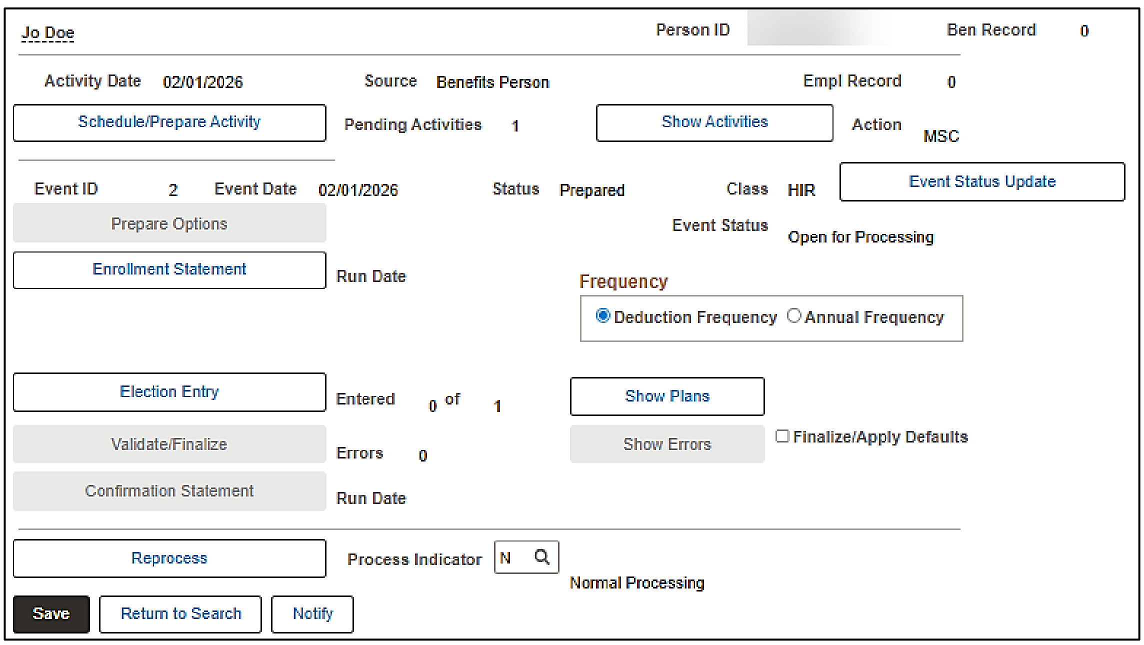
Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



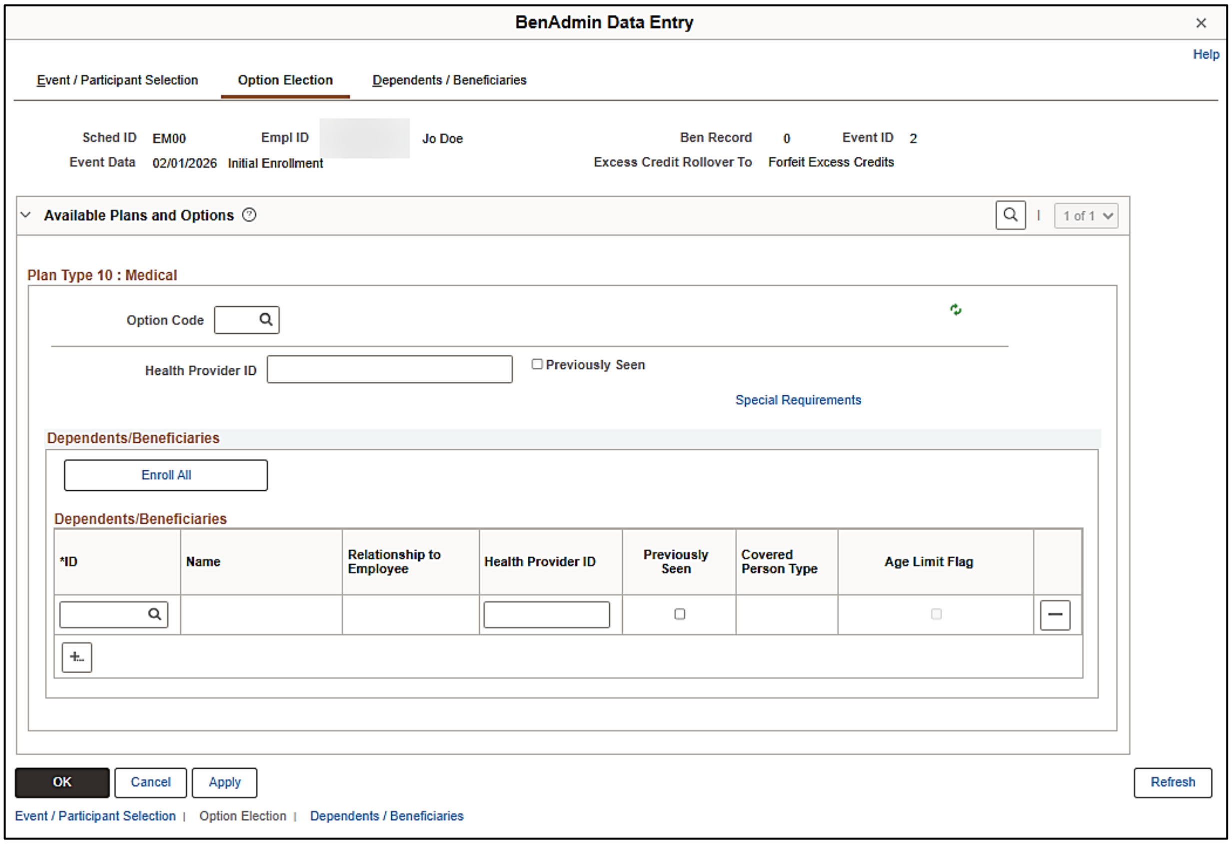
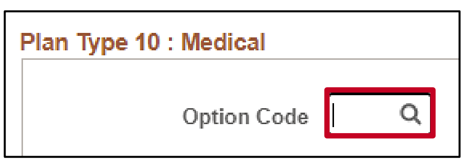
Step	Action
13.	Click the **OK** button to close the message.



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

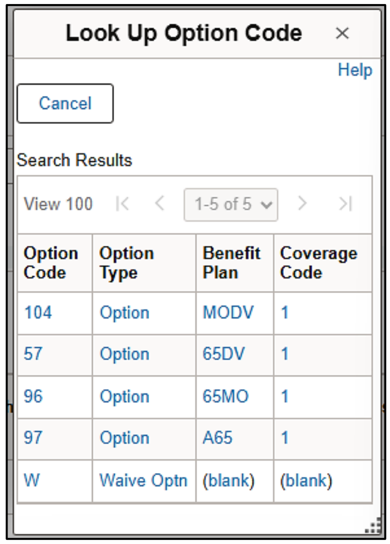


Step	Action
14.	Click the **Election Entry** button.

Step	Action
	The **BenAdmin Data Entry** page displays in a pop-up window with the **Option Election** tab displayed by default. 
15.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section. 

Step	Action

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



Option Code	Option Type	Benefit Plan	Coverage Code
104	Option	MODV	1
57	Option	65DV	1
96	Option	65MO	1
97	Option	A65	1
W	Waive Optn	(blank)	(blank)

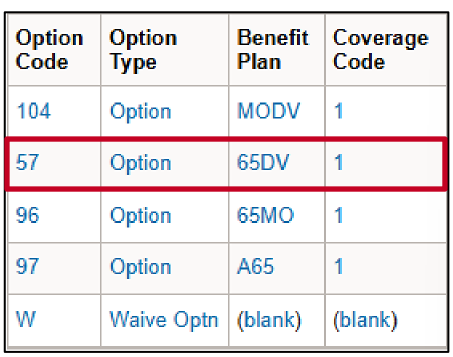
If the Over 65 Benefit Plans do not populate, ensure the Medicare information was accurately entered.

If the information is incorrect, update as needed and then complete an “Open” / “Assign Benefit Program” to the HIR Event to pick up the change.

For additional information on re-opening and reprocessing Benefit Events, see the Job Aid titled **BN361 Re-opening and Reprocessing a Benefit Event** located on the Cardinal website in **Job Aids** under **Learning**.

16. Select the applicable Option Code.

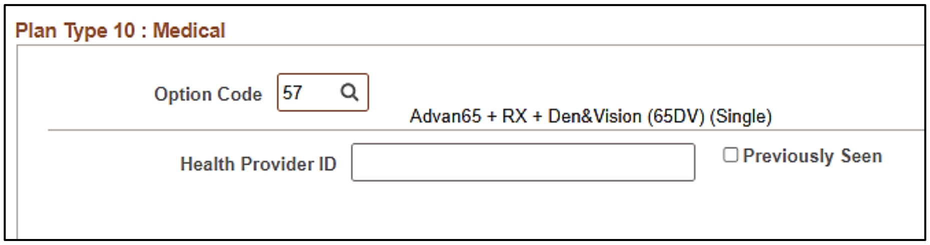
In this example, Option Code “57” is selected.



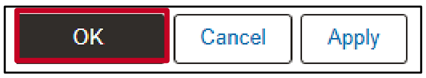
Option Code	Option Type	Benefit Plan	Coverage Code
104	Option	MODV	1
57	Option	65DV	1
96	Option	65MO	1
97	Option	A65	1
W	Waive Optn	(blank)	(blank)

Step	Action

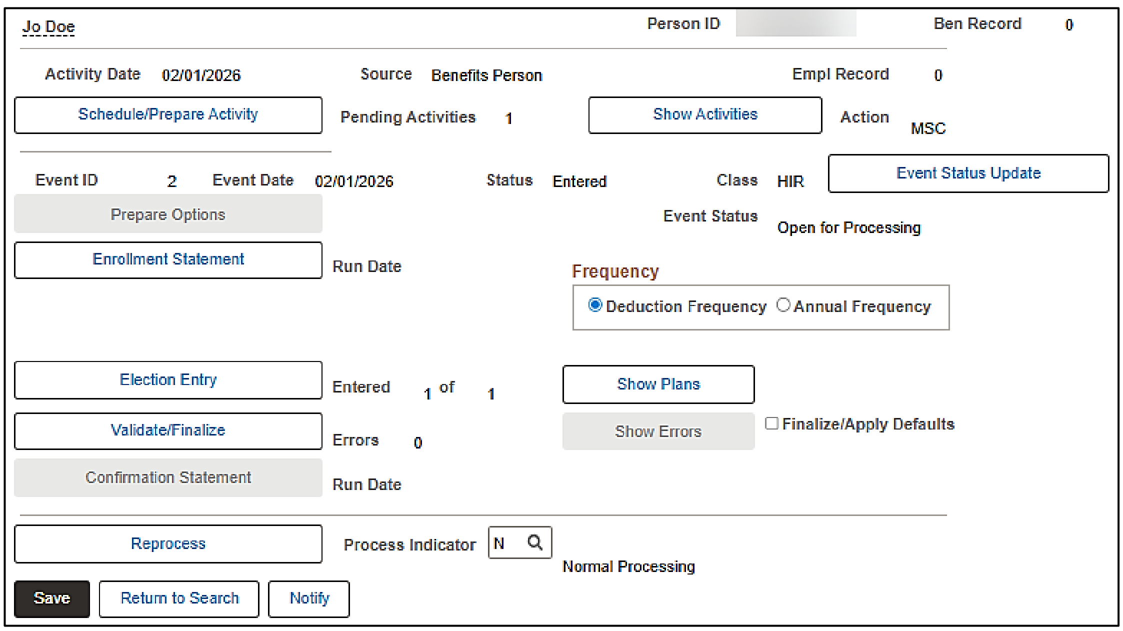
The **Plan Type 10: Medical** section redisplays with the selected Option Code displayed.



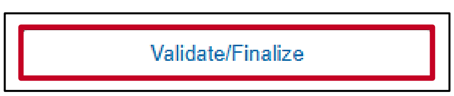
Step	Action
17.	Click the **OK** button.

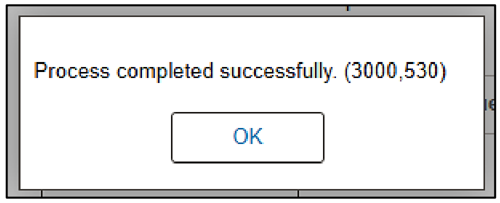
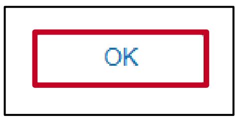
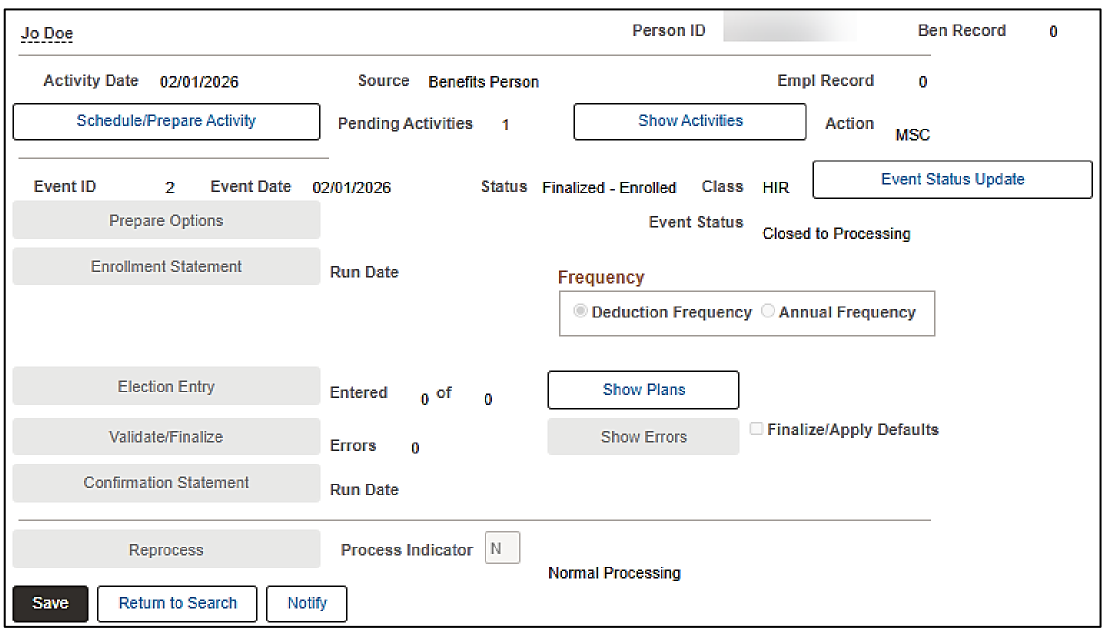


The **On-Demand Event Process** page redisplays.



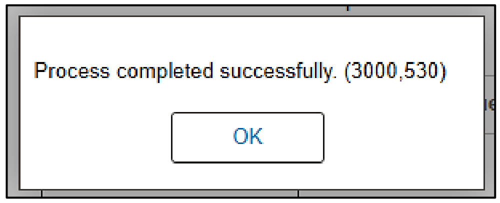
Step	Action
18.	Click the **Validate/Finalize** button.



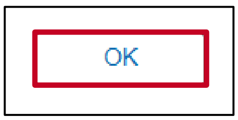
Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
19.	Click the **OK** button to close the message. 
	The **On-Demand Event Process** page redisplays. 
20.	Click the **Schedule/Prepare Activity** button for the “MSC” event if applicable. Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run. 

Step	Action

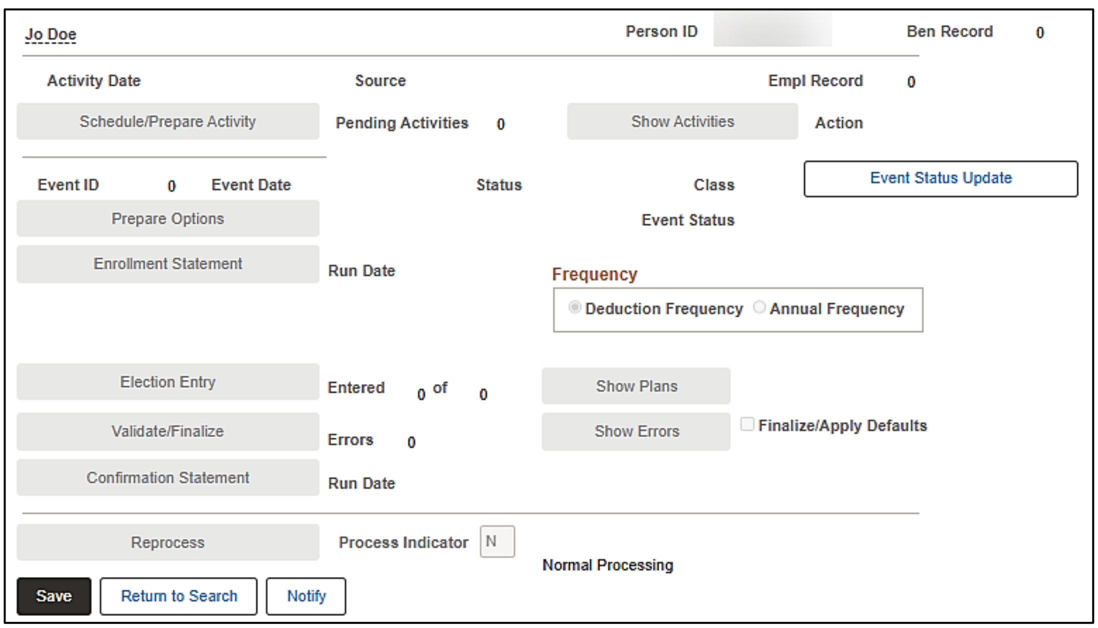
A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



Step	Action
21.	Click the **OK** button to close the message.



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



The spouse has been hired, linked to the retiree, and enrolled in Medicare.