

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	3
Scenario 1: Employee Turns 65 (with single coverage).....	4
The Benefits Personal Data Page	4
Process the Medicare Manual Event	7
Scenario 2: Employee Turns 65 (with dependents covered)	19
The Benefits Personal Data Page	19
Process the Medicare Manual Event	22
Hire the Dependent as an Employee	36
Scenario 3: Under 65 Employee with Dependent Turning 65	77
Process the Medicare Manual Event	77
Hire the Spouse as an Employee	94
The Benefits Personal Data Page	127
Enroll the Spouse in Medicare.....	130



Revision History

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

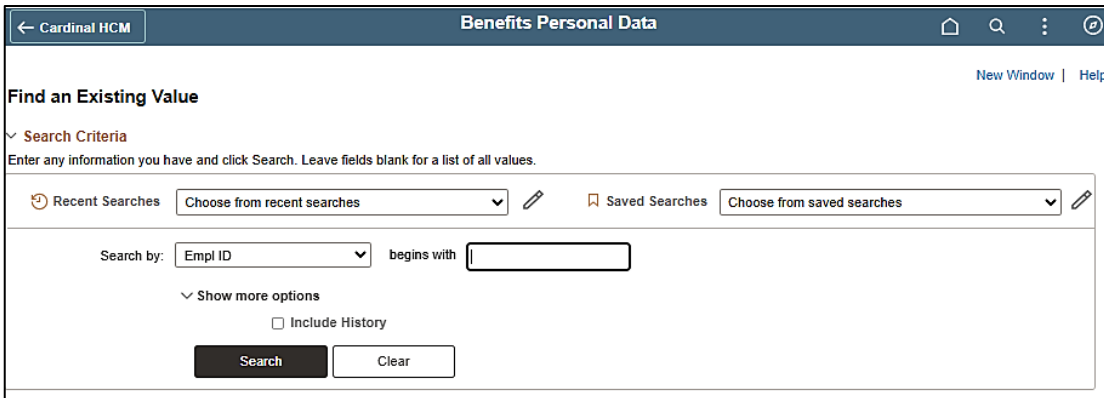
Scenario 1: Employee Turns 65 (with single coverage)

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

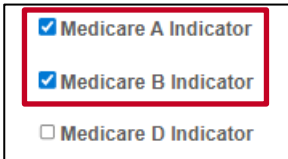
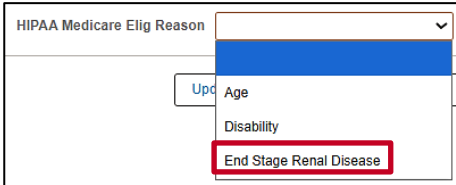
Before enrolling a retired employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

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. 

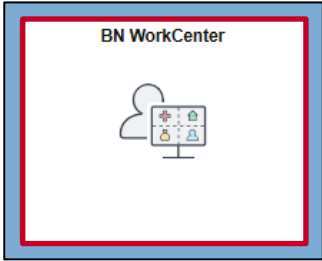
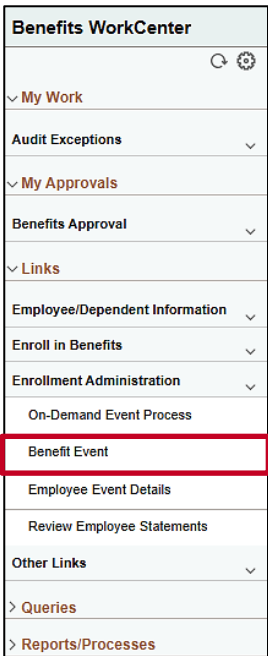


Step	Action																											
	The Search Results display. ▼ Search Results 2 results - Empl ID [REDACTED] <table border="1"><thead><tr><th>Empl ID</th><th>Name</th><th>Last Name</th><th>Middle Name</th><th>Benefit Record Number</th><th>Business Unit</th><th>Department</th><th>Organizational Relationship</th><th></th></tr></thead><tbody><tr><td>[REDACTED]</td><td>JANE DOE</td><td>DOE</td><td>(blank)</td><td>0</td><td>18100</td><td>18100</td><td>Emp</td><td>></td></tr><tr><td>[REDACTED]</td><td>JANE DOE</td><td>DOE</td><td>(blank)</td><td>1</td><td>18100</td><td>99999</td><td>Emp</td><td>></td></tr></tbody></table>	Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship		[REDACTED]	JANE DOE	DOE	(blank)	0	18100	18100	Emp	>	[REDACTED]	JANE DOE	DOE	(blank)	1	18100	99999	Emp	>
Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship																					
[REDACTED]	JANE DOE	DOE	(blank)	0	18100	18100	Emp	>																				
[REDACTED]	JANE DOE	DOE	(blank)	1	18100	99999	Emp	>																				
4.	Click the Drill In (>) icon on any row in the Search Results. <table border="1"><thead><tr><th>Empl ID</th><th>Name</th><th>Last Name</th><th>Middle Name</th><th>Benefit Record Number</th><th>Business Unit</th><th>Department</th><th>Organizational Relationship</th><th></th></tr></thead><tbody><tr><td>[REDACTED]</td><td>JANE DOE</td><td>DOE</td><td>(blank)</td><td>0</td><td>18100</td><td>18100</td><td>Emp</td><td>></td></tr><tr><td>[REDACTED]</td><td>JANE DOE</td><td>DOE</td><td>(blank)</td><td>1</td><td>18100</td><td>99999</td><td>Emp</td><td>></td></tr></tbody></table>	Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship		[REDACTED]	JANE DOE	DOE	(blank)	0	18100	18100	Emp	>	[REDACTED]	JANE DOE	DOE	(blank)	1	18100	99999	Emp	>
Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship																					
[REDACTED]	JANE DOE	DOE	(blank)	0	18100	18100	Emp	>																				
[REDACTED]	JANE DOE	DOE	(blank)	1	18100	99999	Emp	>																				
	The Benefits Personal Data page displays. ← Cardinal HCM Benefits Personal Data New Window Help Personalize Page JANE.DOE Person ID [REDACTED] Benefits Personal Data Highly Compensated Employee *Highly Compensated Last Year Not Eligible for the Plan Benefits Personal Data - Date Sensitive 1 of 1 View All *Effective Date 08/06/2026 Medicare Number Alternate Medicare Number ☐ Medicare A Indicator Medicare Reason A ☐ Medicare B Indicator Medicare Reason B ☐ Medicare D Indicator Medicare Reason D HIPAA Medicare Elig Reason Save Return to Search Previous in List Next in List Notify Update/Display Include History																											

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

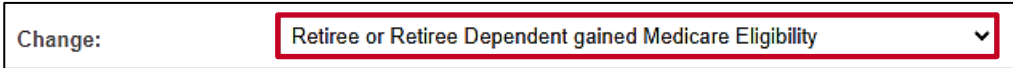
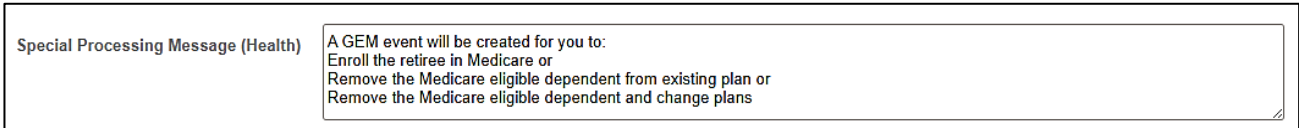
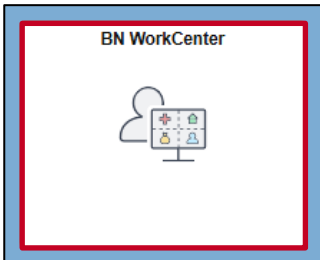
To enroll the retiring employee in Medicare, the Benefits Administrator (BA) must create a Benefit Event.

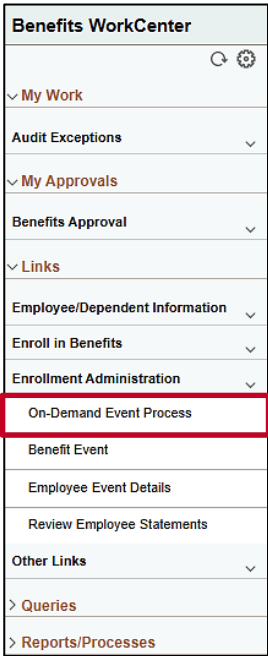
Step	Action
1.	Navigate to the Benefit Event Detail page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path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

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



Step	Action
	The Benefit Event Detail page displays. Benefit Event Detail JANE.DOE Employee ID Benefit Record Number 1 Life Event 1 of 1 View All Life Event Life Event Date Paperwork Receipt Date Health Change FSA Change Health Change Needed: FSA Change Needed: Current Cov. Level: Future Cov. Level: Change: Change: Special Processing Message (Health) Special Processing Message (FSA) Save Return to Search
5.	Click the Life Event dropdown button and select “EE/Dep. Gained Eligibility – Medicare/Medicaid” list item. Life Event Life Event
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. Life Event EE/Dep. Gained Eligibility - Medicare/Medicaid Life Event Date
7.	Enter the Paperwork Receipt Date. 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.

On-Demand Event Maintenance
Find an Existing Value
 Search Criteria
 Enter any information you have and click Search. Leave fields blank for a list of all values.

 Recent Searches

Choose from recent searches
 

 Saved Searches

Choose from saved searches
 

Empl ID

begins with
 

Empl Record

=
 

Name

begins with
 

Last Name

begins with
 

Second Last Name

begins with
 

Alternate Character Name

begins with
 

^ Show fewer options

☐ Case Sensitive

Search

Clear

Step	Action																											
14.	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. Empl ID begins with ▾																											
15.	Click the Search button. Search Clear																											
	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. ▼ Search Results 2 results - Empl ID "()" << < 1-2 of 2 > >> View All <table><tr><th>Empl ID</th><th>Empl Record</th><th>Name</th><th>First Name</th><th>Last Name</th><th>Second Last Name</th><th>Alternate Character Name</th><th>Middle Name</th><th></th></tr><tr><td></td><td>0</td><td>JANE DOE</td><td>JANE</td><td>DOE</td><td>(blank)</td><td>(blank)</td><td>(blank)</td><td>></td></tr><tr><td></td><td>1</td><td>JANE DOE</td><td>JANE</td><td>DOE</td><td>(blank)</td><td>(blank)</td><td>(blank)</td><td>></td></tr></table>	Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name			0	JANE DOE	JANE	DOE	(blank)	(blank)	(blank)	>		1	JANE DOE	JANE	DOE	(blank)	(blank)	(blank)	>
Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name																					
	0	JANE DOE	JANE	DOE	(blank)	(blank)	(blank)	>																				
	1	JANE DOE	JANE	DOE	(blank)	(blank)	(blank)	>																				



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

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

JANE DOE Person ID Ben Record 1

Activity Date 09/01/2026 Source Manual Event

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

Event ID 0 Event Date Status Class [Event Status Update](#)

[Prepare Options](#) Event Status

[Enrollment Statement](#) Run Date

Frequency
☒ Deduction Frequency ☐ Annual Frequency

[Election Entry](#) Entered 0 of 0 [Show Plans](#)

[Validate/Finalize](#) Errors 0 [Show Errors](#) ☐ Finalize/Apply Defaults

[Confirmation Statement](#) Run Date

[Reprocess](#) Process Indicator N

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) Normal Processing

16. Click the **Show Activities** button.

[Show Activities](#)

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

JANE DOE Person ID Ben Record 1 [Help](#)

BAS Activity

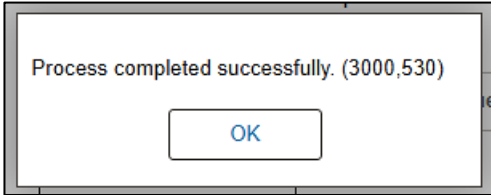
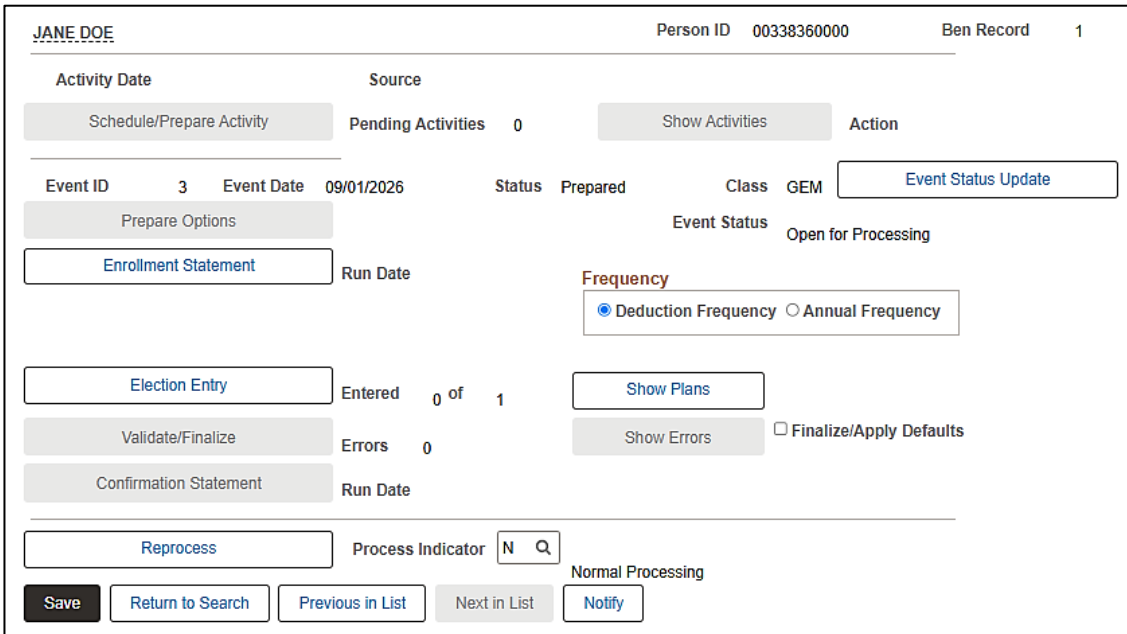
☐ ☐ 1-1 of 1 < >

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☒	1	Manual Event	09/01/2026	0	GEM		+	-

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

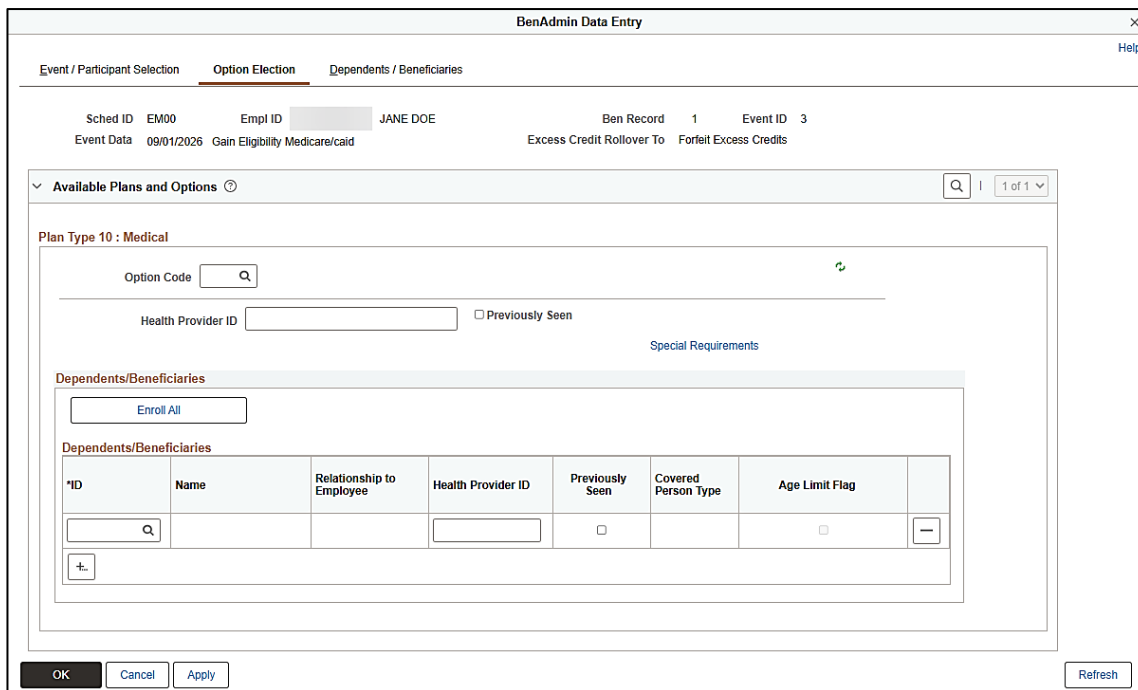
Step	Action																											
i	If an “MSC” BAS Action is listed, select the “GEM” BAS Action. The “MSC” BAS Action will process automatically when the Ben Admin process runs. JOHN DOE Person ID Ben Record 0 BAS Activity Help 🔍 1-2 of 2 <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th>Select</th> <th>Empl Record</th> <th>Action Source</th> <th>Event Date</th> <th>Event Effseq</th> <th>BAS Action</th> <th>COBRA Action</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">☐</td> <td style="text-align: center;">0</td> <td>Benefits Person</td> <td>02/01/2026</td> <td style="text-align: center;">0</td> <td>MSC</td> <td></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> <tr style="border: 2px solid red;"> <td style="text-align: center;">☐</td> <td style="text-align: center;">0</td> <td>Manual Event</td> <td>02/01/2026</td> <td style="text-align: center;">0</td> <td>GEM</td> <td></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> OK Cancel	Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action			☐	0	Benefits Person	02/01/2026	0	MSC		+	-	☐	0	Manual Event	02/01/2026	0	GEM		+	-
Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action																						
☐	0	Benefits Person	02/01/2026	0	MSC		+	-																				
☐	0	Manual Event	02/01/2026	0	GEM		+	-																				
17.	Click the OK button. OK Cancel																											
The On-Demand Event Process page redisplay. JANE DOE Person ID Ben Record 1 Activity Date 09/01/2026 Source Manual Event Schedule/Prepare Activity Pending Activities 1 Show Activities Action GEM Event ID 0 Event Date Status Class Event Status Update Prepare Options Event Status Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Previous in List Next in List Notify																												



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 redisplay. 
20.	Click the Election Entry button. 

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

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



BenAdmin Data Entry

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

Sched ID EM00 Empl ID JANE DOE Ben Record 1 Event ID 3

Event Data 09/01/2026 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 

Health Provider ID ☐ Previously Seen

Special Requirements

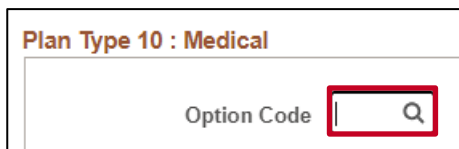
Dependents/Beneficiaries

Enroll All

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
				☐		☐	-
+							

OK Cancel Apply Refresh

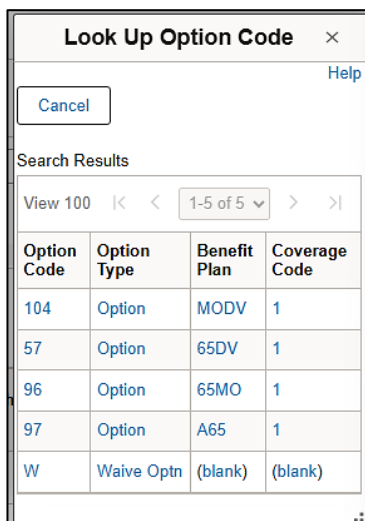
21. Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section.



Plan Type 10 : Medical

Option Code 

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



Look Up Option Code

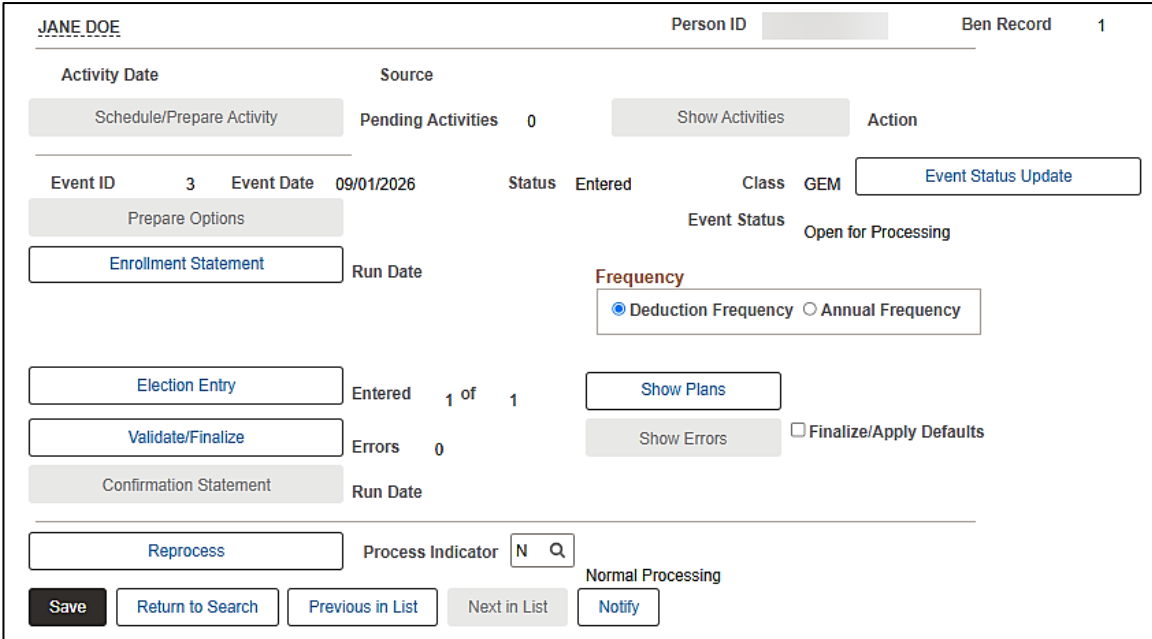
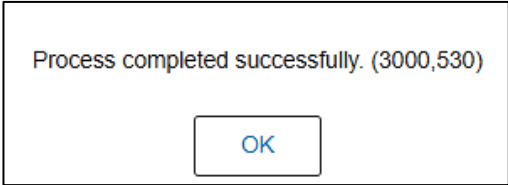
Cancel Help

Search Results

View 100 1-5 of 5

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																								
	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.																								
22.	Select the applicable Option Code. In this example, Option Code “57” is selected. <table border="1"><thead><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr></thead><tbody><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></tbody></table>	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)
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)																						
The Plan Type 10: Medical section redisplay with the selected Option Code displayed. Plan Type 10 : Medical Option Code 57 Advan65 + RX + Den&Vision (65DV) (Single) Health Provider ID ☐ Previously Seen																									
23.	Click the OK button. OK Cancel Apply																								

Step	Action
	The On-Demand Event Process page redisplay. 
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. 

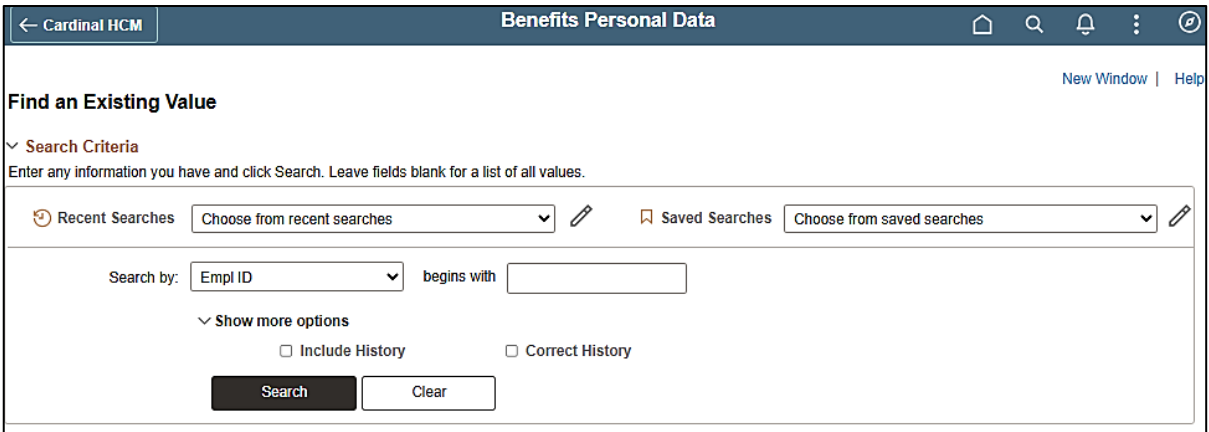
Scenario 2: Employee Turns 65 (with dependents covered)

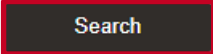
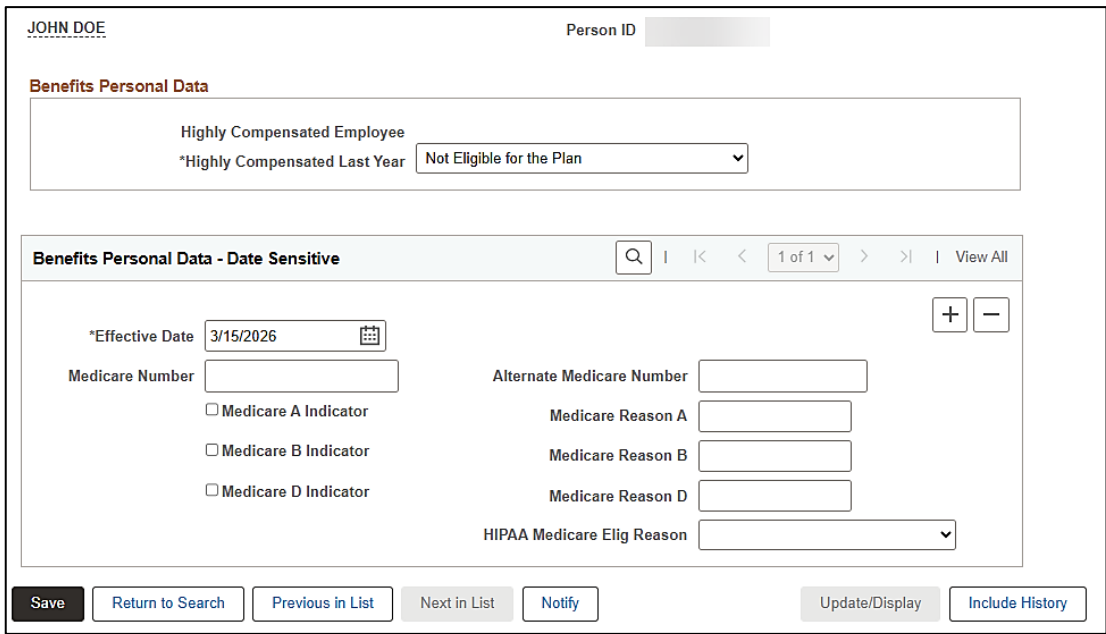
In this scenario, the employee has “Employee + Spouse” coverage, the employee turns 65 and is eligible for Medicare, however the spouse is not eligible for Medicare. The following actions taken by the BA are completed after the employee has been moved to a job that reflects the “Retiree” status and has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

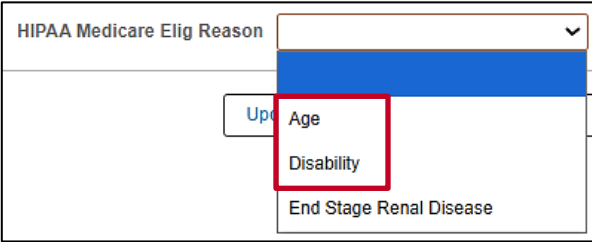
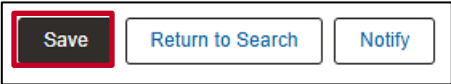
Note: If the employee turns 65 with family coverage, hire the youngest dependent as an employee.

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. 

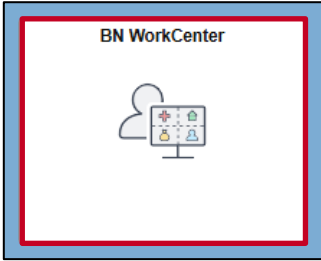
Step	Action
3.	Click the Search button. 
The Benefits Personal Data page displays for the selected retiree. 	
4.	Click the Effective Date Calendar icon in the Benefits Personal Data – Date Sensitive section and select the first day of the month in which the employee is retiring. 
	The Medicare Number 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. 

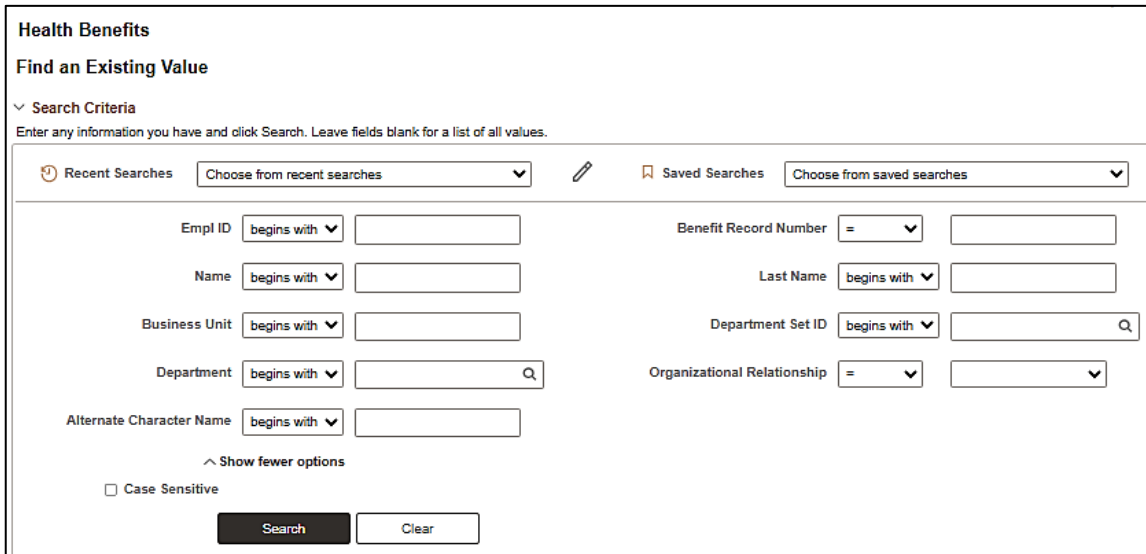
Step	Action
5.	Select both the Medicare A Indicator and the Medicare B Indicator checkbox options. Note: The Medicare D Indicator is not used in Cardinal and should not be selected. 
	For End Stage Renal Disease, the Medicare A, B, and/or D Indicator checkbox options will not be checked. OHB is establishing 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.

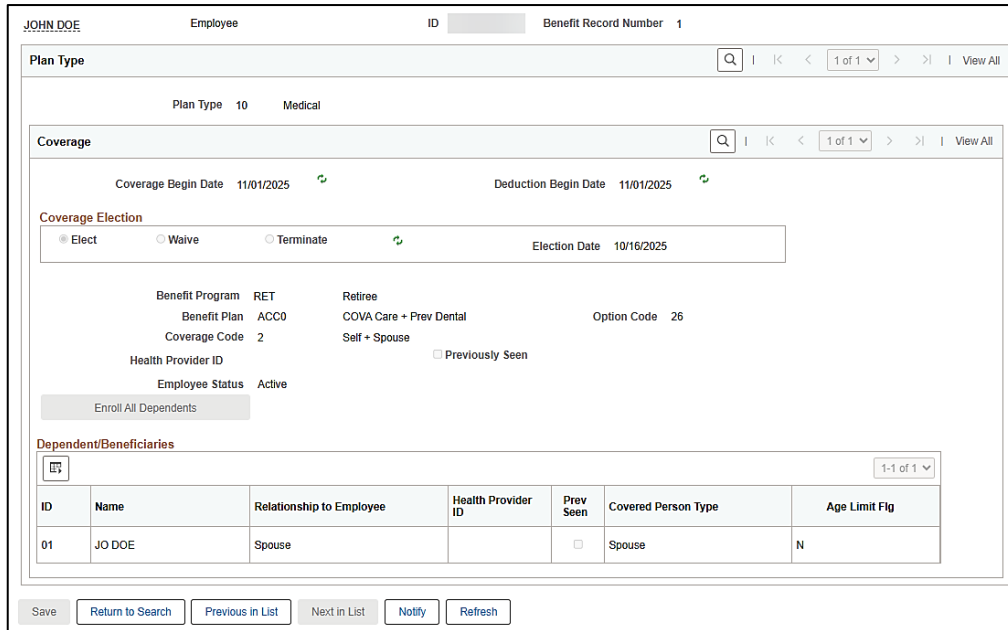
Before adding the manual event for the retiree, the Agency BA must confirm that the retiree has a dependent listed on their current benefit enrollment on the **Health Plan Enrollment** page.

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. 

Step	Action
	Users can also access the Health Plan Enrollment page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Health Plan Enrollment
	The Health Benefits 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.
3.	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. 
4.	Click the Search button. 

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

The **Health Plan Enrollment** page displays.



JOHN DOE Employee ID [redacted] Benefit Record Number 1

Plan Type 10 Medical

Coverage Coverage Begin Date 11/01/2025 Deduction Begin Date 11/01/2025

Coverage Election
☒ Elect ☐ Waive ☐ Terminate Election Date 10/16/2025

Benefit Program RET Retiree
 Benefit Plan ACC0 COVA Care + Prev Dental
 Coverage Code 2 Self + Spouse
 Health Provider ID [redacted] ☐ Previously Seen
 Employee Status Active

Dependent/Beneficiaries

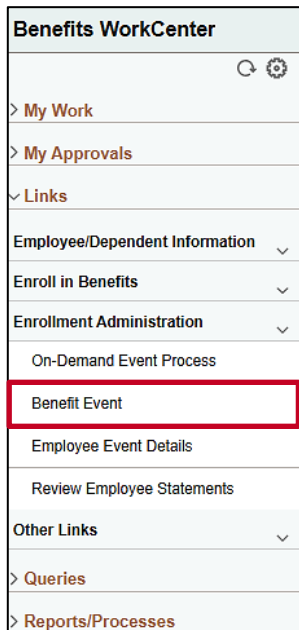
ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg
01	JO DOE	Spouse		☐	Spouse	N

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh



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.

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



Benefits WorkCenter

> My Work

> My Approvals

✓ **Links**

Employee/Dependent Information

Enroll in Benefits

Enrollment Administration

On-Demand Event Process

Benefit Event

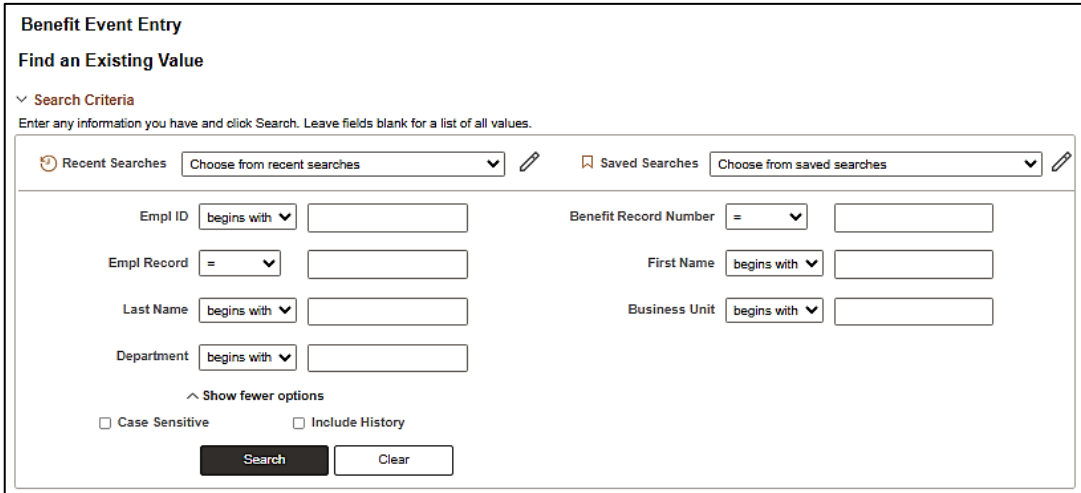
Employee Event Details

Review Employee Statements

Other Links

> Queries

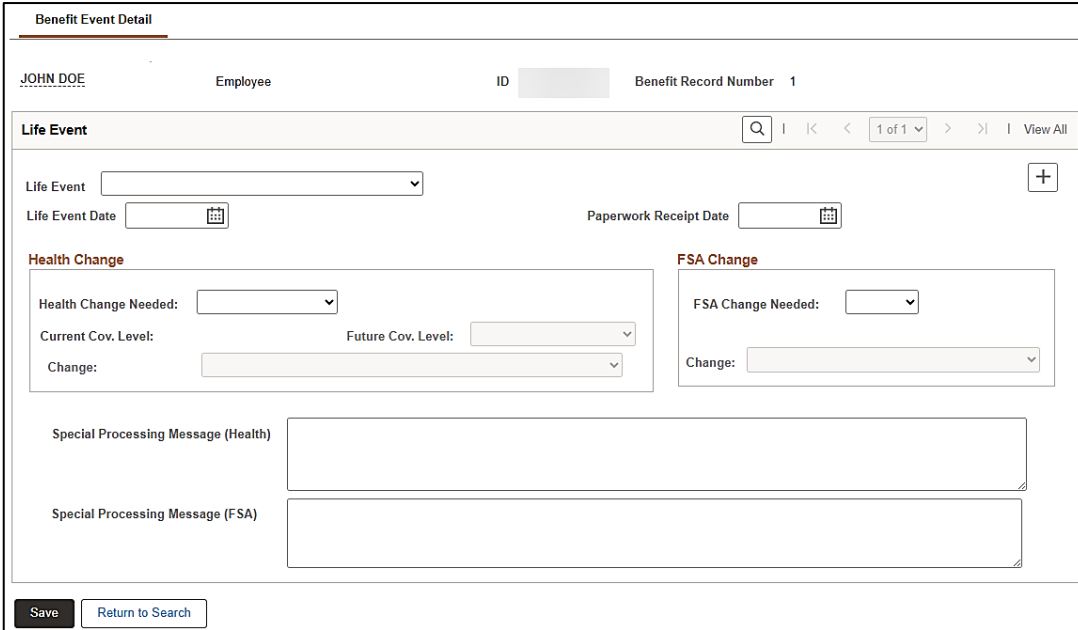
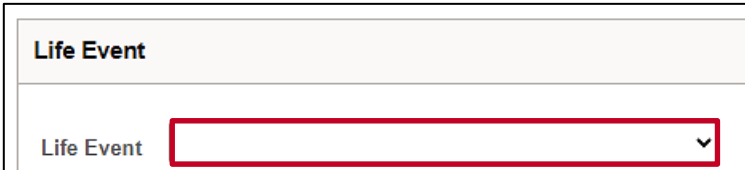
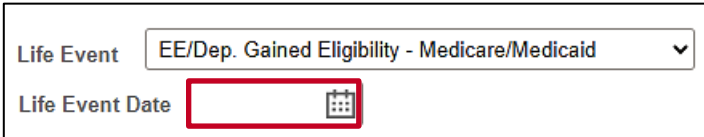
> Reports/Processes

Step	Action
	Users can also access the Benefit 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. 
6.	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. 
7.	Click the Search button. 

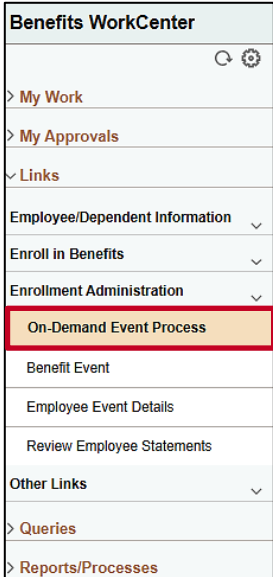


Benefits Job Aid

BN361 Employee Set Up for Medicare

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. 

Step	Action
11.	Click the Health Change Needed dropdown button and select “Yes”. Health Change Health Change Needed: Yes ▾
12.	Click the Future Cov. Level dropdown button and select “Single, Employee”. Future Cov. Level: Single, Employee ▾
13.	Click the Change dropdown button and select “Retiree or Retiree Dependent gained Medicare Eligibility”. Change: Retiree or Retiree Dependent gained Medicare Eligibility ▾
14.	Click the Save button. Save Return to Search
A Special Processing Message (Health) displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created. Special Processing Message (Health) A GEM event will be created for you to: Enroll the retiree in Medicare or Remove the Medicare eligible dependent from existing plan or Remove the Medicare eligible dependent and change plans	
	Now that the GEM Event has been created, the Benefit Event must be processed.

Step	Action
15.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > On-Demand Event Process 
	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.

On-Demand Event Maintenance
Find an Existing Value
 v Search Criteria
 Enter any information you have and click Search. Leave fields blank for a list of all values.

 Recent Searches

Choose from recent searches
 


 Saved Searches

Choose from saved searches
 


Empl ID

begins with
 

Empl Record

=
 

Name

begins with
 

Last Name

begins with
 

Second Last Name

begins with
 

Alternate Character Name

begins with
 

^ Show fewer options

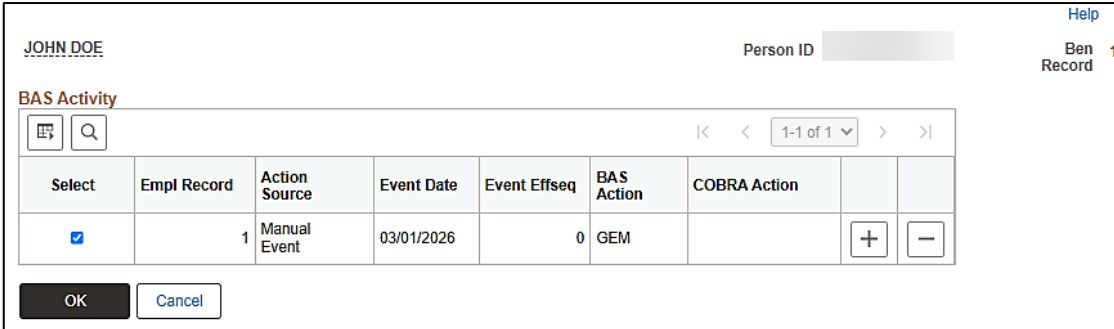
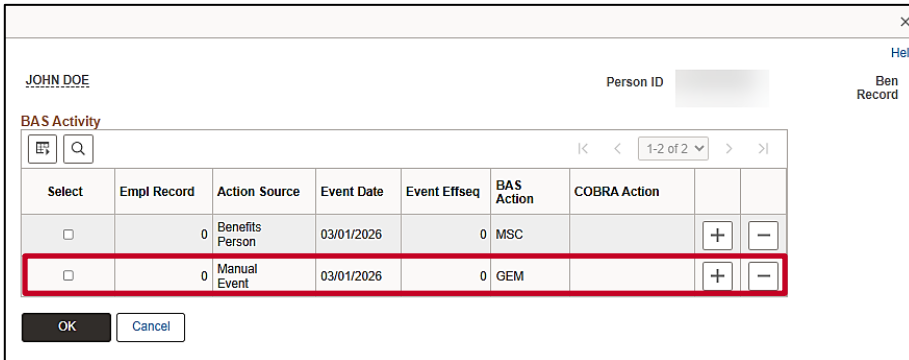
☐ Case Sensitive

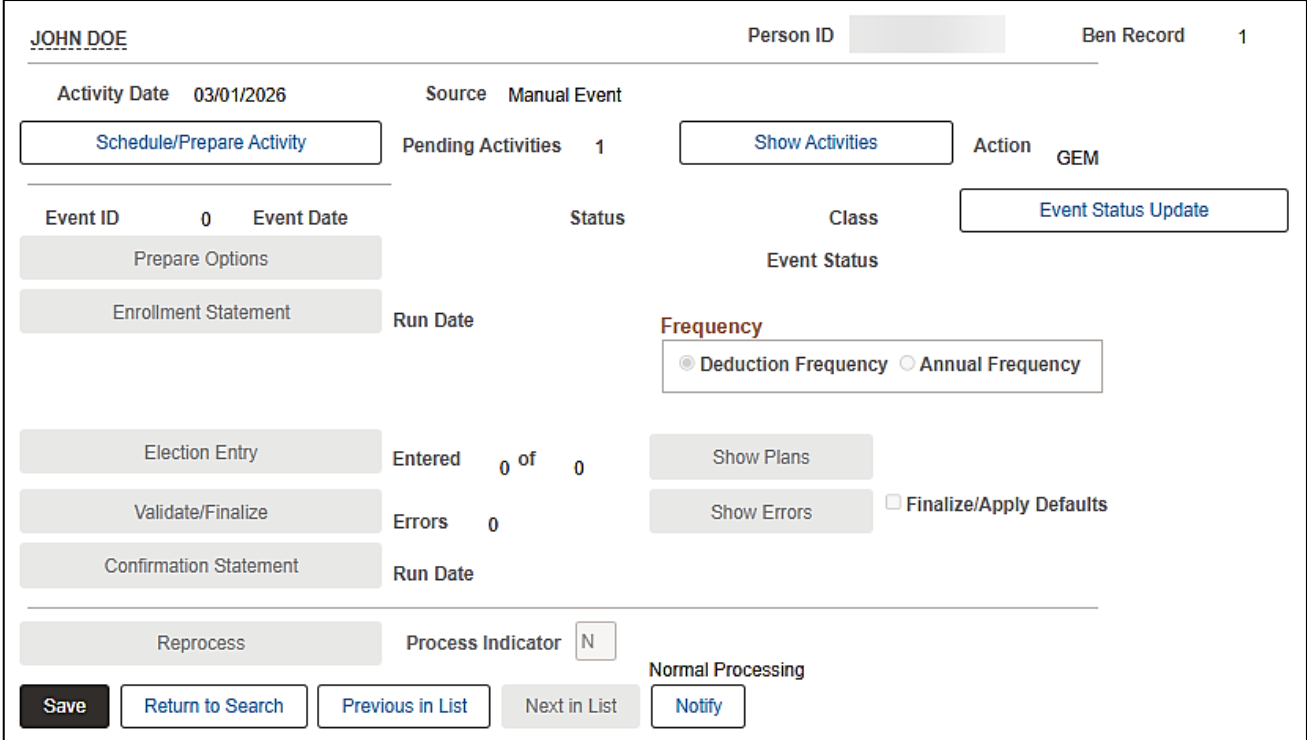
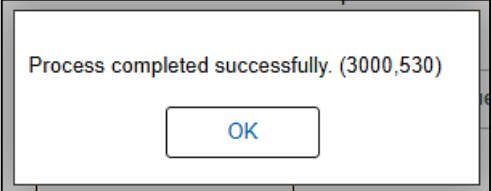
Search

Clear



Step	Action
16.	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. Empl ID begins with ▾
17.	Click the Search button. Search Clear
The On-Demand Event Process page displays. JOHN DOE Person ID Ben Record 1 Activity Date 03/01/2026 Source Manual Event Schedule/Prepare Activity Pending Activities 1 Show Activities Action GEM Event ID 0 Event Date Status Class Event Status Update Prepare Options Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Previous in List Next in List Notify	
18.	Click the Show Activities button. Show Activities

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 redisplay. 
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. 



Benefits Job Aid

BN361 Employee Set Up for Medicare

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

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

JOHN DOE Person ID Ben Record 1

Activity Date Source

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 3 Event Date 03/01/2026 Status Prepared Class GEM Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 0 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

Save Return to Search Previous in List Next in List Notify

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

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

BenAdmin Data Entry

Event / Participant Selection Option Election Dependents / Beneficiaries

Sched ID EM00 Empl ID JOHN DOE Ben Record 1 Event ID 3

Event Data 03/01/2026 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10: Medical

Option Code Health Provider ID Previously Seen Special Requirements

Enroll All

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Step	Action																								
23.	Click the Option Code Look up icon in the Plan Type 10: Medical section. Plan Type 10 : Medical Option Code																								
The Look Up Option Code page displays in a pop-up window. Look Up Option Code Cancel Help Search Results View 100 < < 1-5 of 5 > > <table><thead><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr></thead><tbody><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></tbody></table>		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)
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)																						
i	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.																								
24.	Select the applicable Option Code. In this example, Option Code “57” is selected. <table><thead><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr></thead><tbody><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></tbody></table>	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)
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 redisplay with the selected Option Code displayed. Plan Type 10 : Medical Option Code 57 Advan65 + RX + Den&Vision (65DV) (Single) Health Provider ID ☐ Previously Seen
25.	Click the OK button. OK Cancel Apply
	The On-Demand Event Process page redisplay. JOHN DOE Person ID Ben Record 1 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 3 Event Date 03/01/2026 Status Re-Enter Class GEM Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 1 of 1 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Previous in List Next in List Notify

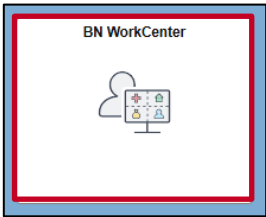
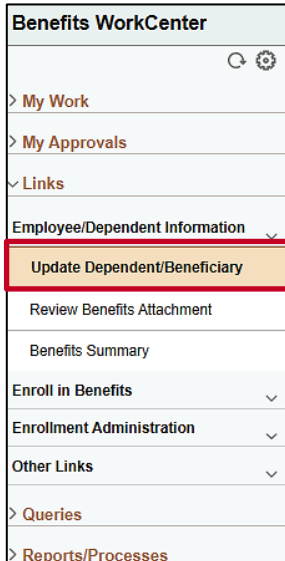


Step	Action
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
27.	Click the OK button to close the message. OK

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.

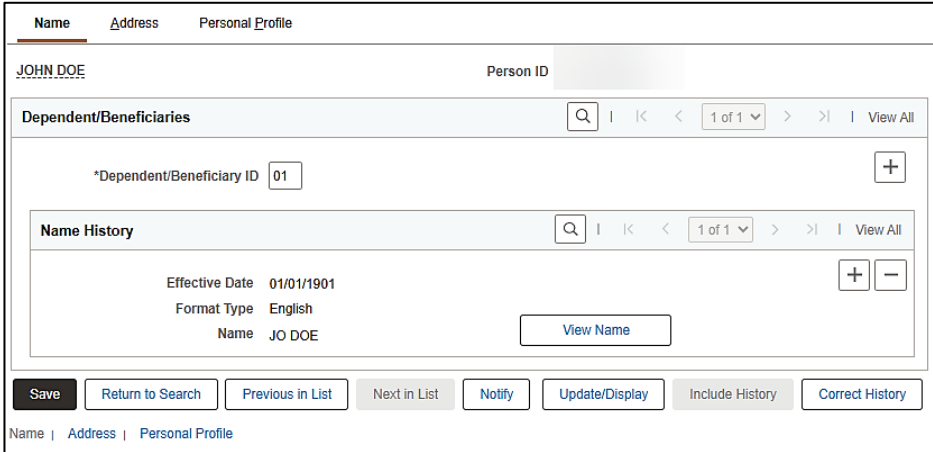
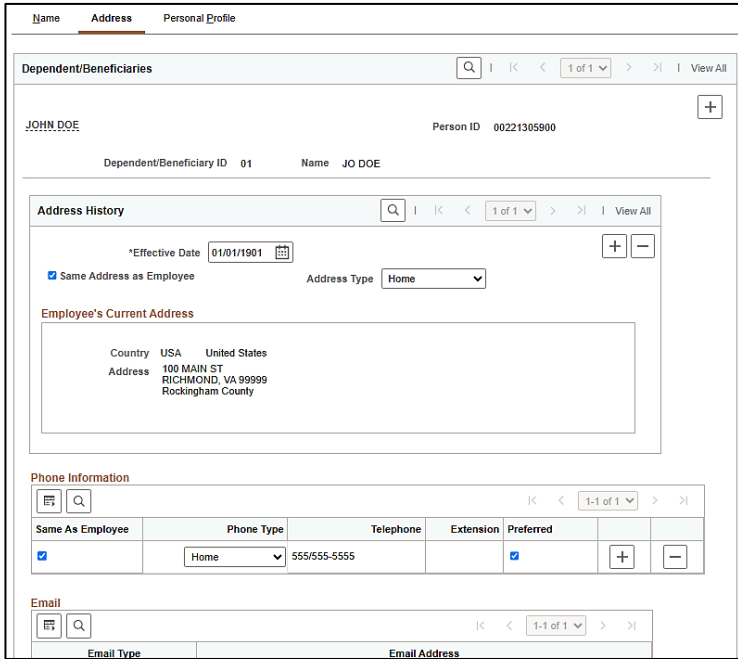
Step	Action
1.	Navigate to the Update Dependent/Beneficiary page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation 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

Step	Action
	The Update Dependent/Beneficiary Find an Existing Value Search page displays. Update Dependent/Beneficiary Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with Middle Name begins with ^ Show fewer options ☐ Case Sensitive ☐ Include History ☐ Correct History Search Clear

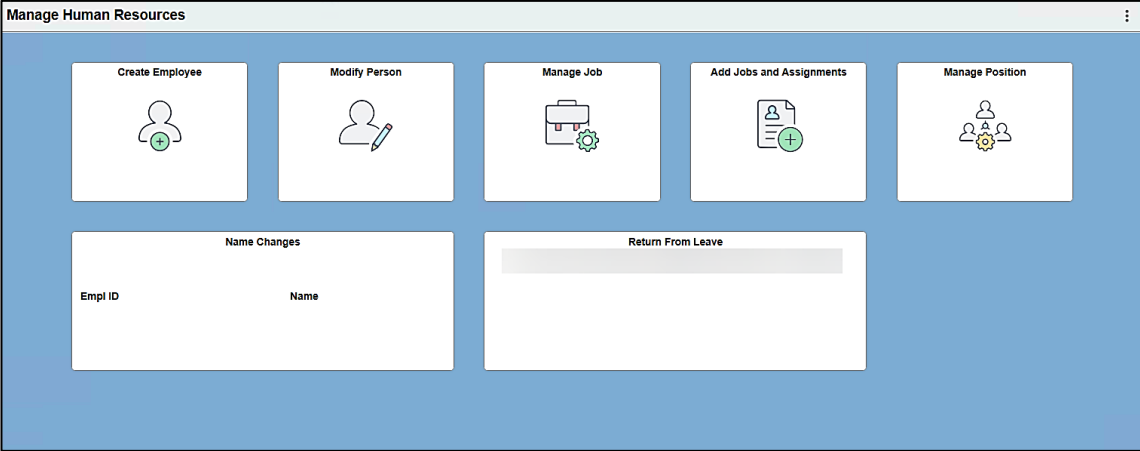
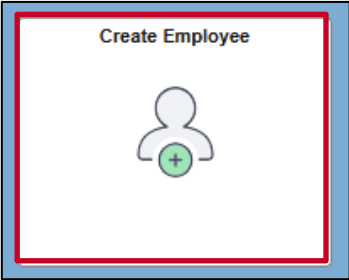


Benefits Job Aid

BN361 Employee Set Up for Medicare

Step	Action
	The Update Dependent/Beneficiary page displays for the selected retiree with the Name tab displayed by default. 
5.	Click the Address tab to review the Address information for the dependent. 
	The Address page displays. 
6.	Confirm that the information on this page is accurate for the dependent.

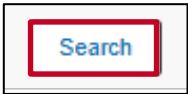
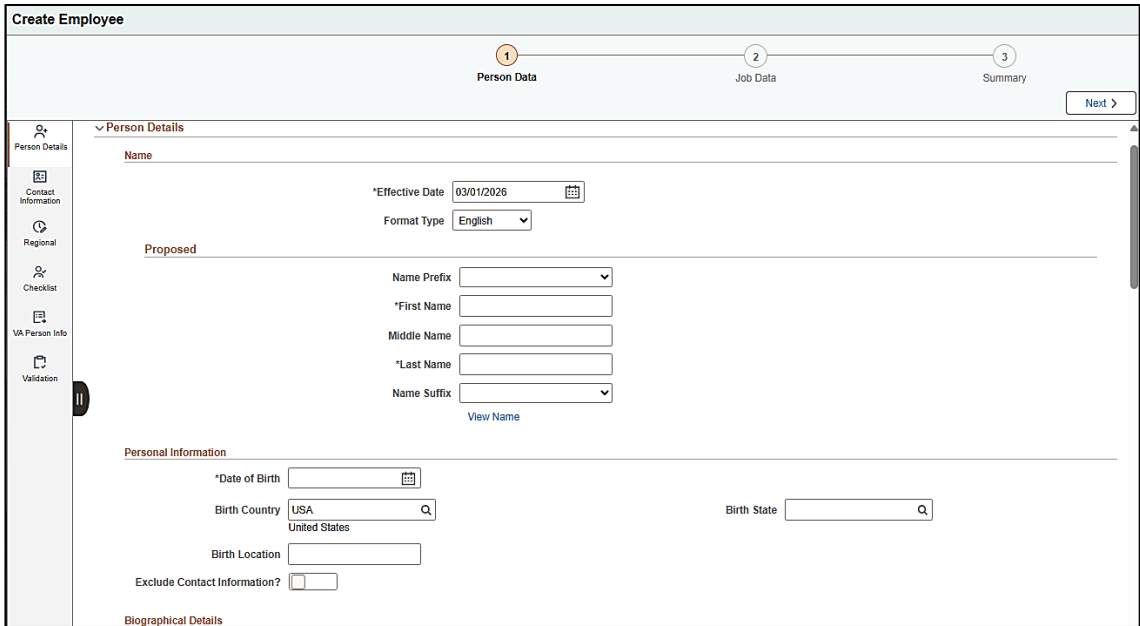
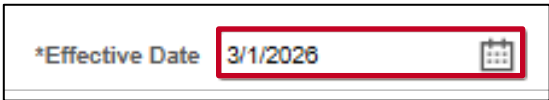
Step	Action
7.	Click the Personal Profile tab. Name Address Personal Profile
	The Personal Profile page displays. Name Address Personal Profile Person ID Personal Profile < > 1 of 1 View All Dependent/Beneficiary ID 01 JO DOE + *Date of Birth 05/29/1984 Birth Country Date of Death Medicare Entitled Date Birth Location Birth State ☐ Riders/Orders exist Riders/Orders Dependent Proof ☒ Qualified Dependent Personal History < > 1 of 1 View All *Effective Date 01/01/1901 *Relationship to Employee Spouse *Dependent Beneficiary Type Approved Dependent *Gender Male *Marital Status Married ☐ Student ☐ Disabled ☐ Smoker As of 01/01/1901 As of As of As of Occupation USA ▼ National ID
8.	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.

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. 

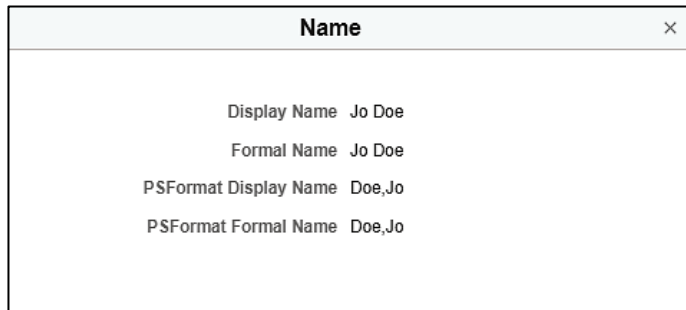
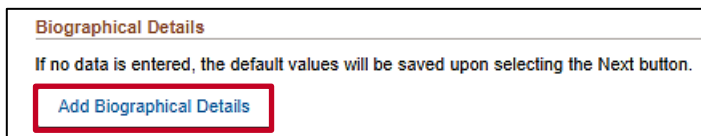
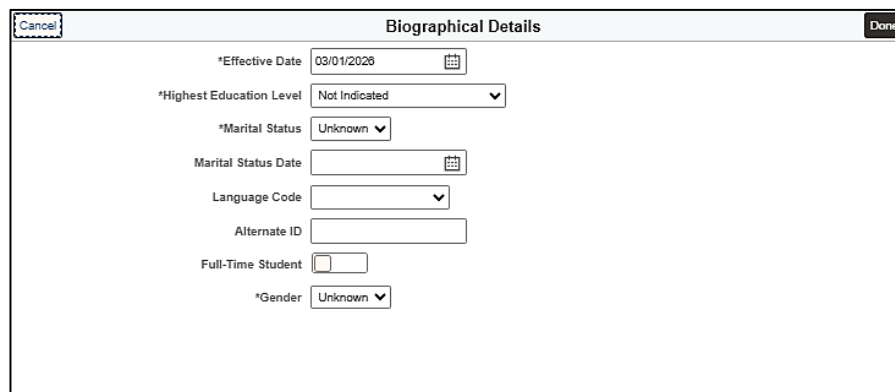


Benefits Job Aid

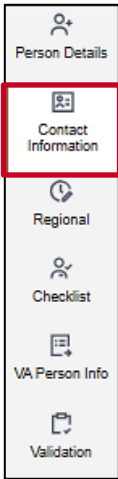
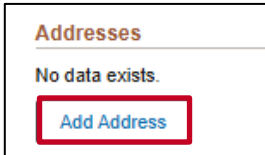
BN361 Employee Set Up for Medicare

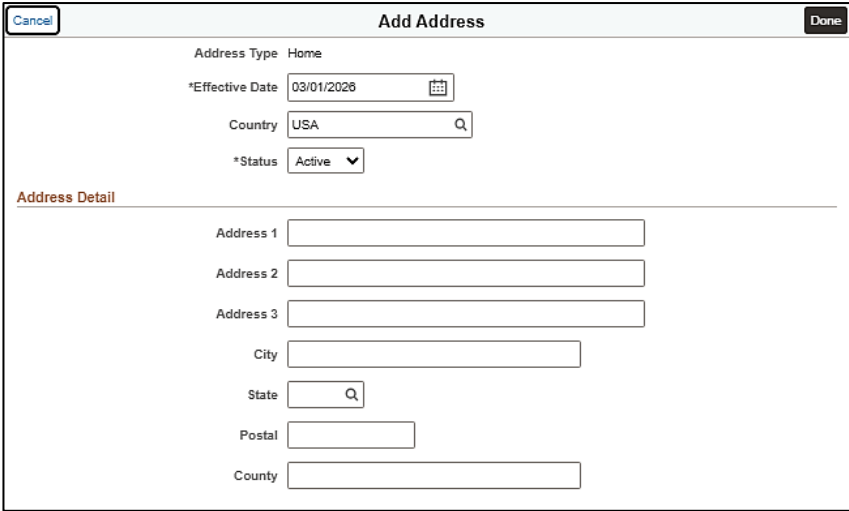
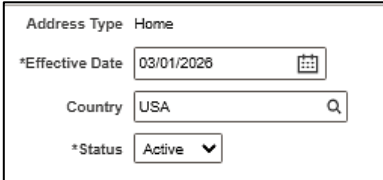
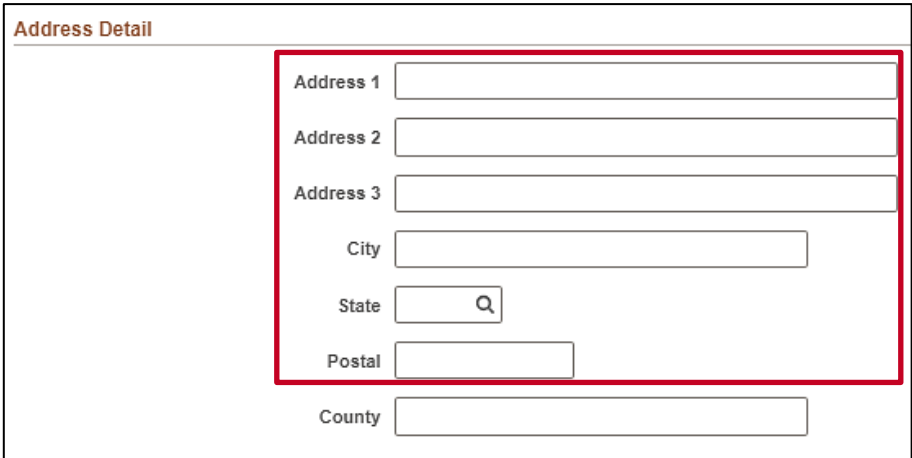
Step	Action
	The Create Employee Search page displays. 
11.	Enter the dependent's SSN in the National ID field. 
12.	Click the Search button. 
	The Create Employee page displays with the Person Details tab (Step 1 of 3: Person Data) displayed by default. 
13.	The Effective Date field defaults to today's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

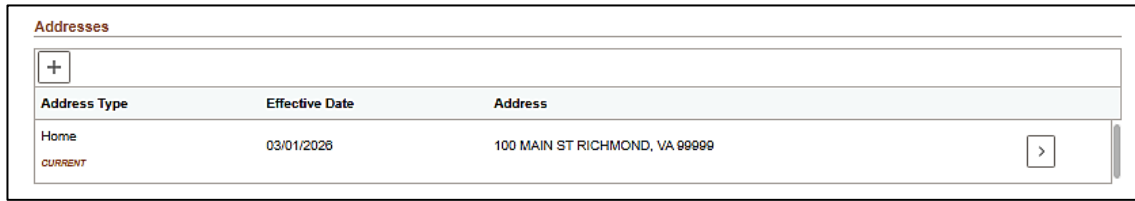
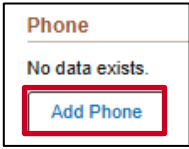
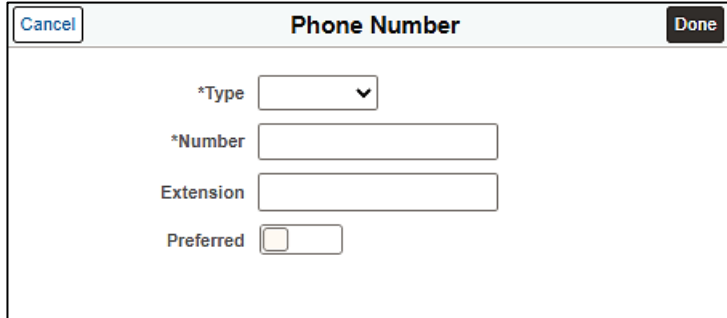
Step	Action
	The Effective Date cannot be greater than today's date when creating or modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled HR351 Overview of Effective Dating . This Job Aid can be found on the Cardinal website in Job Aids under Learning .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

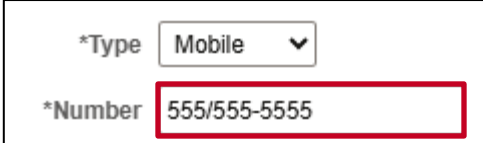
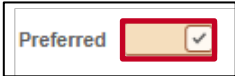
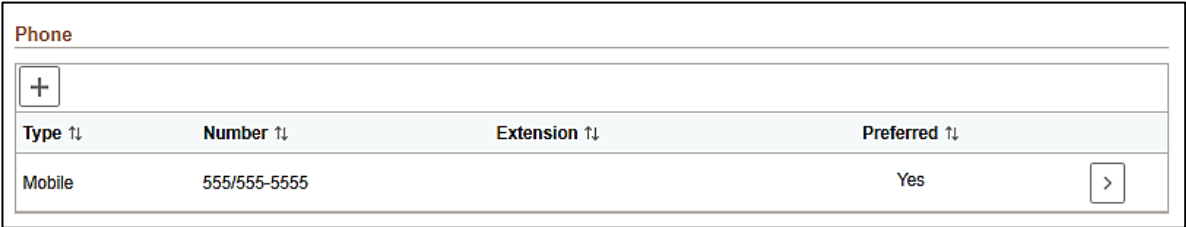
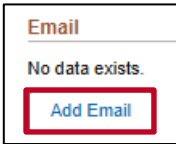
Step	Action
	The Name page displays in a pop-up window. Note: After reviewing, click the “X” button to close the pop-up window and adjust the name fields if needed. 
20.	Scroll down to the Personal Information section and click the Date of Birth Calendar icon to select the dependent’s date of birth (required). 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. 

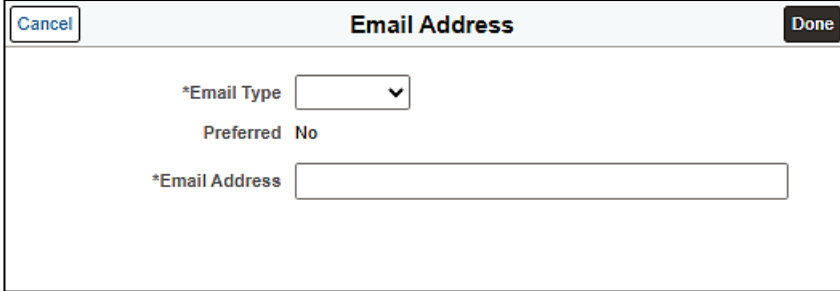
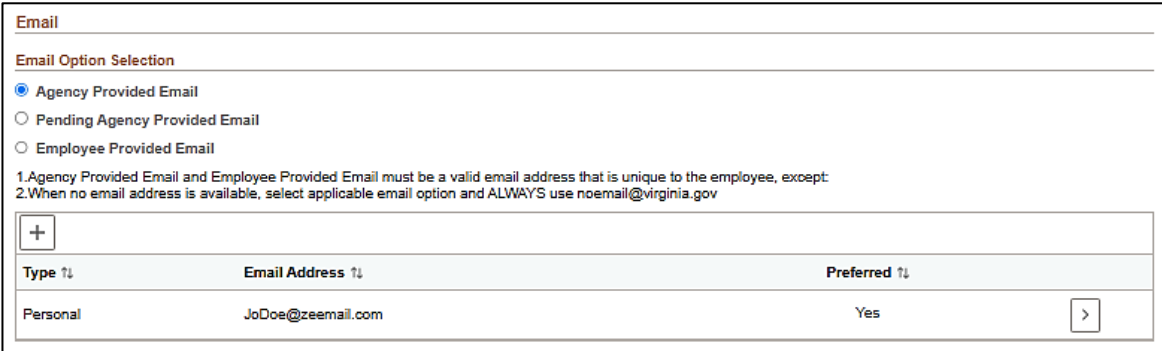
Step	Action
	The Effective Date field within this section defaults to the effective date selected above. Do not change.
22.	Click the Marital Status dropdown button and select the dependent's legal marital status. *Marital Status Unknown ▼
	When a selection is made in the Marital Status field, the Marital Status Date updates to the Effective Date above. Do not change. *Marital Status Married ▼ Marital Status Date 03/01/2026 
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. *Gender Unknown ▼
25.	Click the Done button. Done
26.	Scroll down to the National ID section. National ID + *Country t↓ USA *National ID Type t↓ Social Security Number National ID t↓ Primary ID t↓ Yes >
	The National ID field auto-populates. National ID + *Country t↓ USA *National ID Type t↓ Social Security Number National ID t↓ Primary ID t↓ Yes >

Step	Action
27.	Click the Contact Information tab or use the scroll bar to scroll to the Contact Information section. 
The Contact Information section displays. 	
28.	Click the Add Address button in the Addresses section. 

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. 

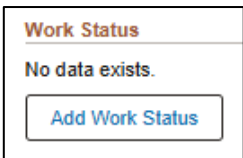
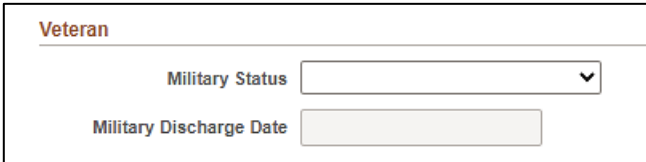
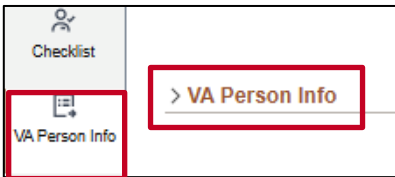
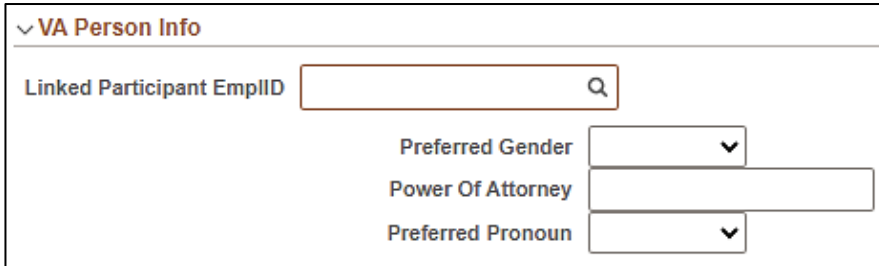
Step	Action
	The Address 1 , City , State , and Postal are required fields. The employee's personal data cannot be saved if any of these fields are blank.
30.	Click the Done button once the applicable Address Detail information has been entered. 
The Addresses section redisplay. 	
31.	Click the Add Phone button in the Phone section. 
The Phone Number page displays in a pop-up window. 	
32.	Click the Type dropdown button and select the type of phone number being entered. 

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 redisplay. 	
	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. 

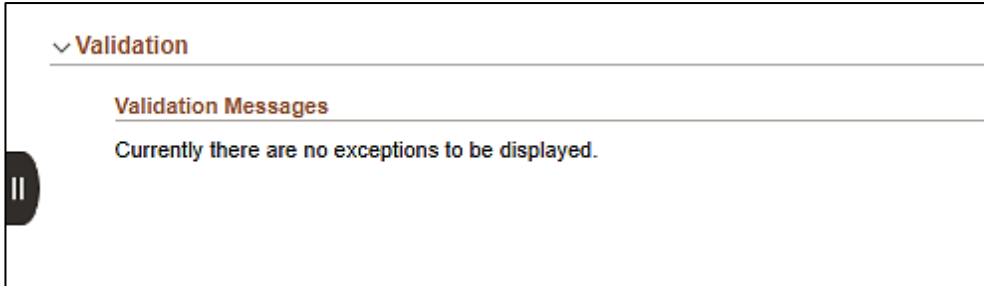
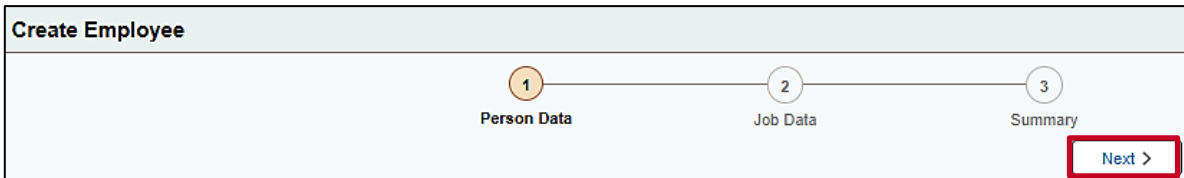
Step	Action
	The Email Address page displays in a pop-up window. 
37.	Click the Email Type dropdown button and select "Personal". 
38.	Enter the email address in the Email Address field. 
	When no email address is available, use noemail@virginia.gov. This can be replaced with a personal email address 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.
39.	Click the Done button. 
	The Email section redisplay. 

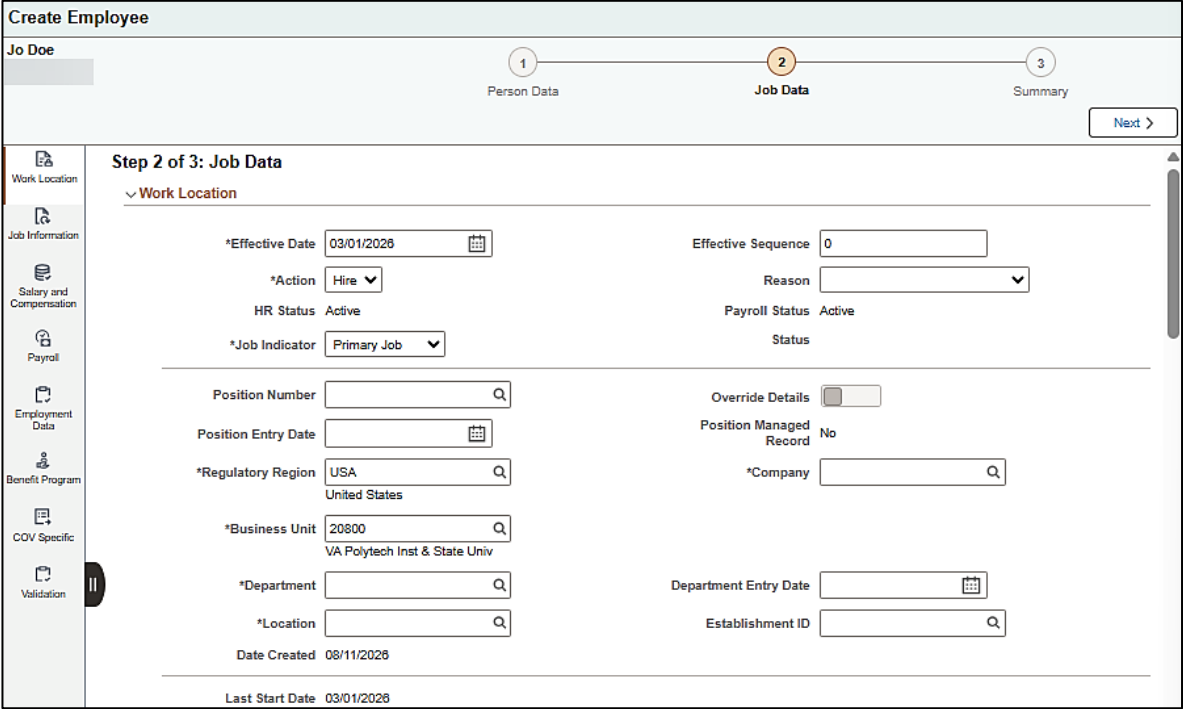
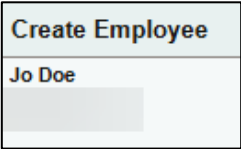
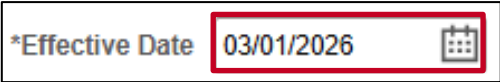


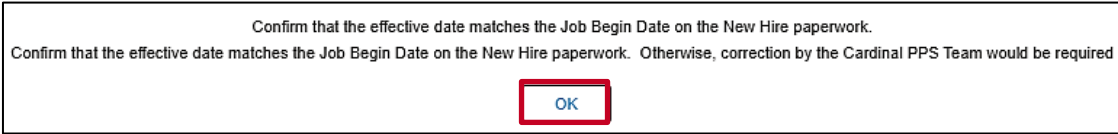
Step	Action													
40.	Select the Employee Provided Email radio button option in the Email Option Selection section. Email Option Selection ☐ Agency Provided Email ☐ Pending Agency Provided Email ☒ Employee Provided Email 1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except: 2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov													
41.	Click the Regional tab. Person Details Contact Information Regional Checklist VA Person Info Validation													
The Regional section displays. Regional USA Ethnic Group <table><tr><th>Regulatory Region</th><th>Ethnic Group</th><th>Primary</th></tr><tr><td>USA</td><td></td><td>☐</td></tr><tr><td>United States</td><td></td><td></td></tr></table> Work Status No data exists. Add Work Status Smoker History <table><tr><th>Smoker</th><th>Smoker Status Date</th></tr><tr><td>No</td><td></td></tr></table> CheckList Select Checklist Code Hire		Regulatory Region	Ethnic Group	Primary	USA		☐	United States			Smoker	Smoker Status Date	No	
Regulatory Region	Ethnic Group	Primary												
USA		☐												
United States														
Smoker	Smoker Status Date													
No														

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. 	

Step	Action
45.	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. Linked Participant EmplID
	The VA Person Info page redisplay with the Click here to add Other Linked Participant Details link displayed. VA Person Info Linked Participant EmplID Preferred Gender ▼ Power Of Attorney Preferred Pronoun ▼ Click here to add Other Linked Participant Details
	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.
46.	Click the Validation tab. Person Details Contact Information Regional Checklist VA Person Info Validation

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.

Step	Action
The Create Employee (Step 2 of 3: Job Data) page displays with the Work Location tab displayed by default.	
	
48.	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. 
49.	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
50.	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. 
51.	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.
52.	Click the Job Information tab. 

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

The **Job Information** section displays.

Supervisor

SOC CD

Job Code

ORPHBO

ORP Retiree

Supervisor Level

E

Employee

Reports To

View Current Incumbents

Regular/Temporary

Regular

Employee Class

Regular Shift

Not Applicable

Classified Ind

Classified

Supervisor Name

Supervisor Posn

Job Entry Date

03/01/2026

Reports To Manager

Full/Part

Part-Time

*Officer Code

None

Shift Rate

Shift Factor

Standard Hours

20.00

FTE

0.500000

Encumbrance Override

Work Period

Weekly

Adds to FTE Actual Count?

[> USA](#)

53. Click the **Employee Class** dropdown button and select the applicable Employee Class. In this example “ORPRetiree” has been selected.

Employee Class

ORPRetiree

54. Click the **Salary and Compensation** tab.

Work Location

Job Information

Salary and Compensation

Payroll

Employment Data

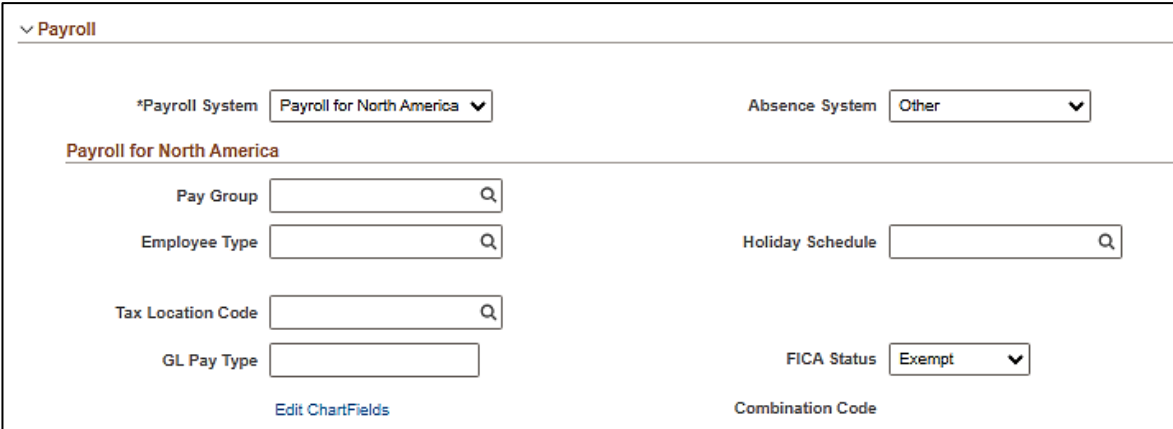
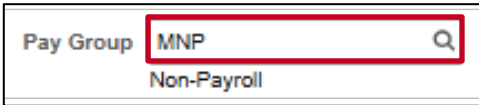
Benefit Program

COV Specific

Validation



Step	Action
	The Salary and Compensation section displays. Salary and Compensation Salary Plan Salary Admin Plan Grade Step Includes Wage Progression Rule Grade Entry Date Step Entry Date Compensation Compensation Rate 0.000000 *Frequency Annual Comparative Information Change Amount 0.000000 USD Frequency Annual Change Percent 0.000 Comparison Ratio Pay Rates Annual USD Monthly USD Daily USD Hourly USD Default Pay Components Pay Components No Pay Components exists. Add Pay Component Calculate Compensation
55.	Click the Frequency Look up icon and select “M” (Monthly). *Frequency M Monthly
56.	Click the Default Pay Components button. Default Pay Components
57.	Click the Calculate Compensation button. Calculate Compensation

Step	Action
58.	Click the Payroll tab. 
	The Payroll section displays. 
59.	Click the Pay Group Look up icon and select “MNP” (Non-Payroll). 
60.	Enter the applicable Tax Location Code in the Tax Location Code field. 

Step	Action
	Other fields in the Payroll for North America section auto-populate based upon the selected Pay Group. Do not change. Payroll for North America Pay Group MNP  Non-Payroll Employee Type S  Salaried Holiday Schedule NOHOL  LOCALITY Tax Location Code 311  Blacksburg GL Pay Type FICA Status Exempt 
61.	Click the Benefit Program tab.  Work Location  Job Information  Salary and Compensation  Payroll  Employment Data  Benefit Program  COV Specific  Validation

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

The **Benefit Program** section displays.

Benefit Program

Benefit Record Number 0

*Benefits System Benefits Administration

Benefits Employee Status Active

Annual Benefits Base Rate

USD

Enter or update the ACA Eligibility details from the related actions in Job Actions Summary.

Benefits Administration Eligibility

BAS Group ID

Eligible Field 1

Eligible Field 2

Eligible Field 3

Eligible Field 4

Eligible Field 5

Eligible Field 6

Eligible Field 7

Eligible Field 8

Eligible Field 9

Benefit Program Participation Details

Effective Date 1%

Benefit Program 1%

Currency Code 1%

03/01/2026

PSX

Sys delivered empty Ben Pgm

USD

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")

Eligible Field 1

Eligible Field 2

Eligible Field 3

Eligible Field 4

Eligible Field 5

Eligible Field 6

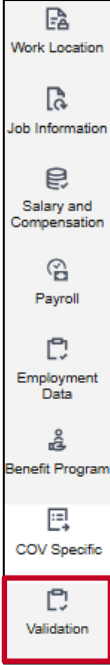
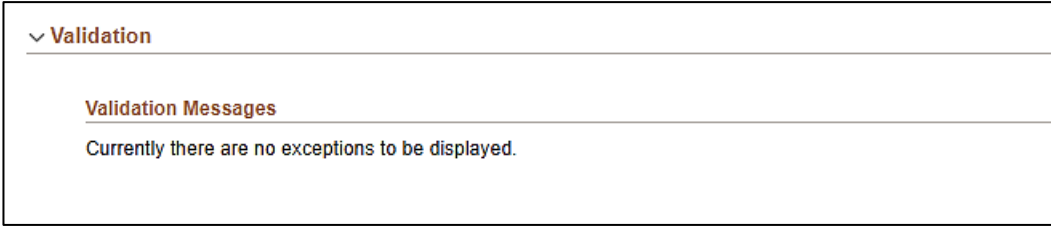
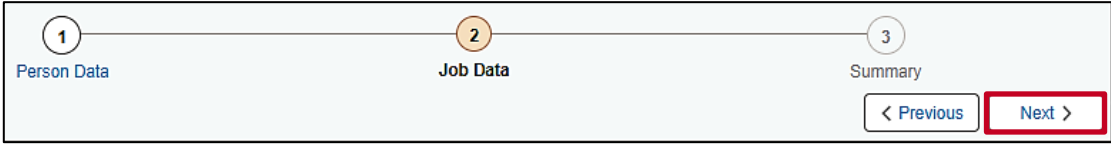
Eligible Field 7

Eligible Field 8

Eligible Field 9



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**.

Step	Action
63.	Click the Validation tab. 
	The Validation section displays. 
64.	Click the Next button. 



Benefits Job Aid

BN361 Employee Set Up for Medicare

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

The **Validation Messages** section displays.

Validation Messages

☐ Proceed with warning

Validation Successful with warnings

4 rows

Message Severity	Message Text
1 Warning	Warning -- date out of range. (15,9)
2 Warning	Warning -- Head count of 620 exceeds maximum head count of 1 for position. (1000,156)
3 Warning	Warning -- Compensation Frequency has been updated. (1010,264)
4 Warning	Warning -- Compensation Rate is zero. (1000,31)

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.

Validation

Validation Messages

Validation failed

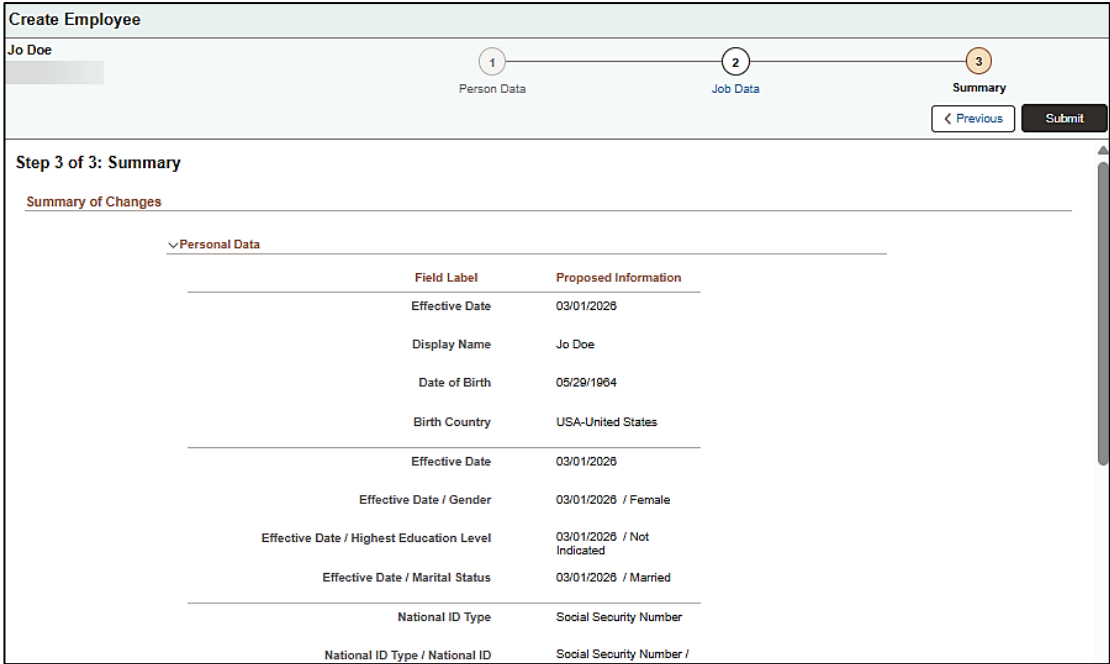
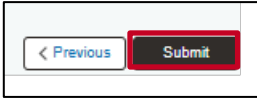
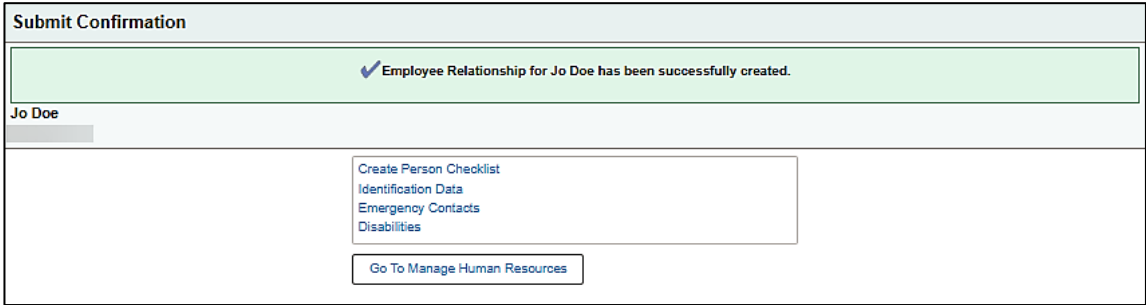
3 rows

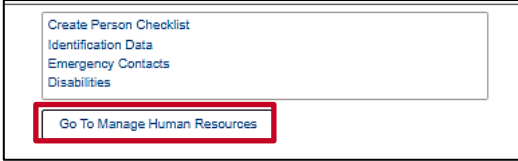
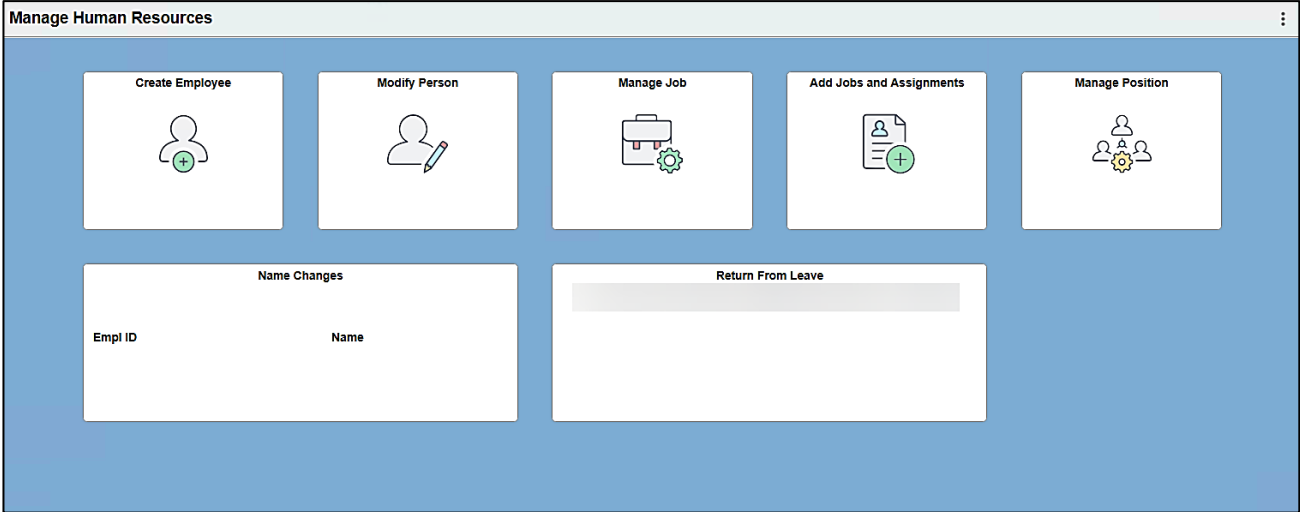
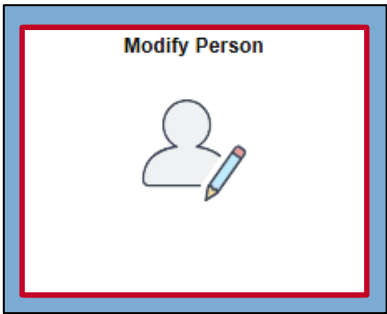
Message Severity	Message Text
1 Warning	Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.
2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)
3 Error	Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)

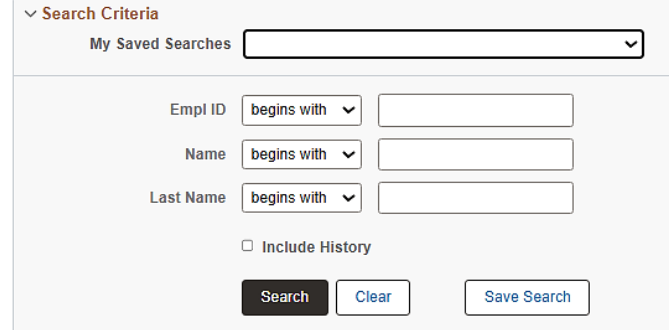
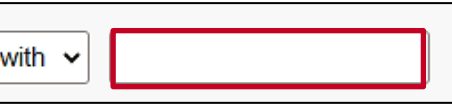
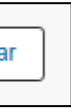
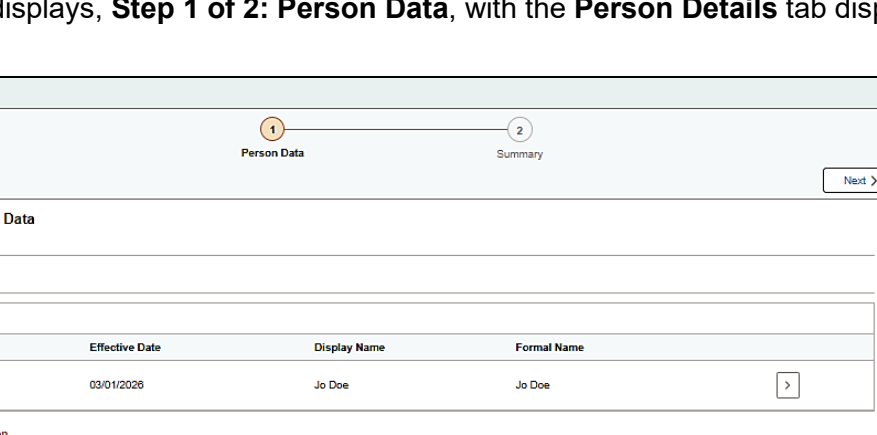
Validation Messages

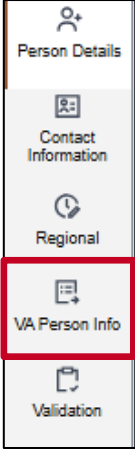
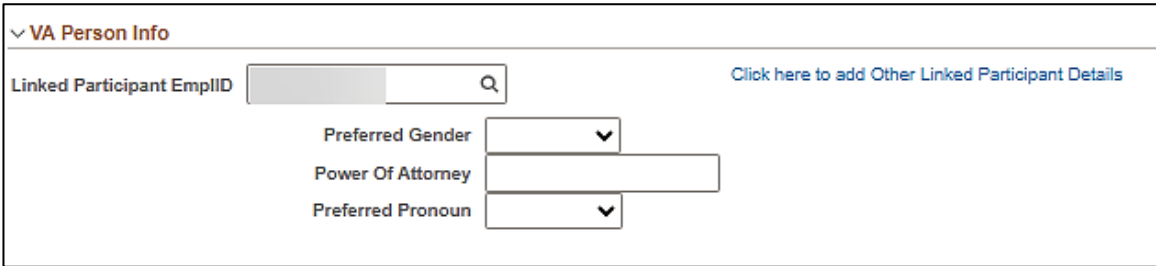
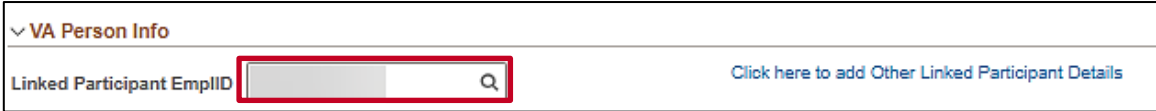
☒ Proceed with warning

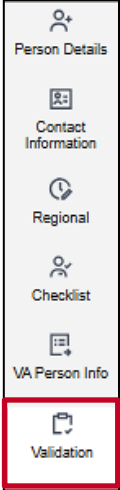
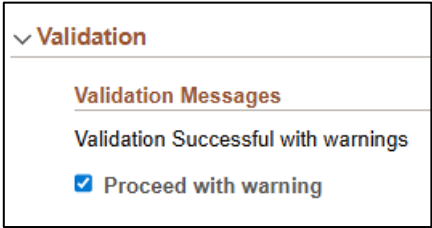
Validation Successful with warnings

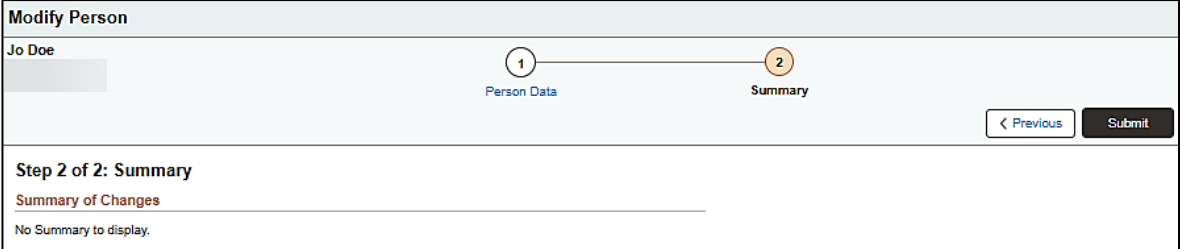
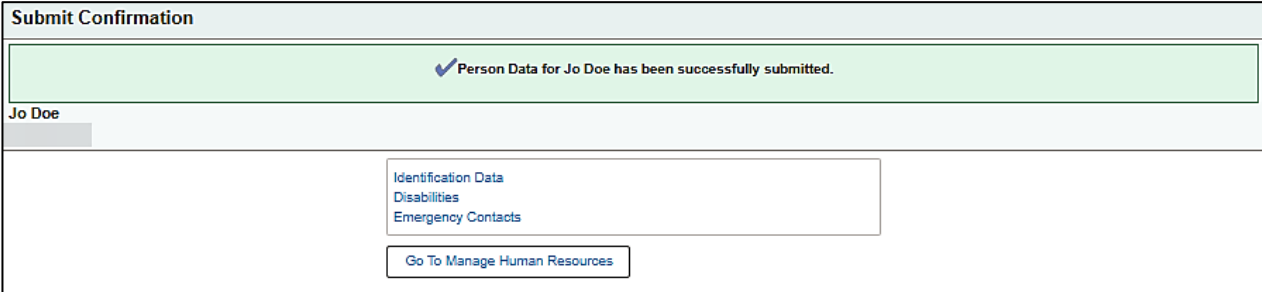
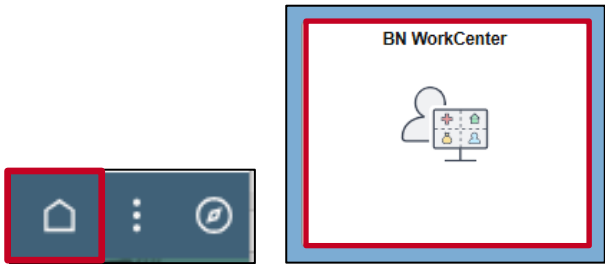
Step	Action
	The Create Employee Step 3 of 3: Summary page displays. 
66.	Review the Summary of Changes section, and then click the Submit button. 
	The Submit Confirmation page displays. 
	As a reminder, Cardinal has auto assigned the Employee ID Number for the dependent. Make note of the Employee ID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

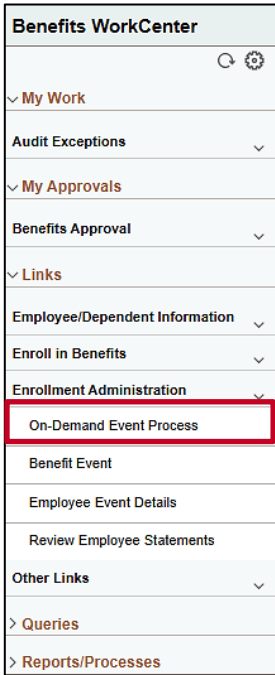
Step	Action
67.	Click the Go To Manage Human Resources link on the Submit Confirmation page. 
The Manage Human Resources page displays. 	
68.	Click the Modify Person tile. 

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. 

Step	Action
71.	Click the VA Person Info tab. 
The VA Person Info section displays. 	
72.	Click the VA Person Info link to expand the section. 
The VA Person Info section expands to show all the fields in this section. 	
73.	Validate that the retiree's Employee ID is populated in the Linked Participant EmplID field. If not, enter the retiree's Employee ID. 

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. 

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

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.

On-Demand Event Maintenance

Find an Existing Value

 **Search Criteria**

Enter any information you have and click Search. Leave fields blank for a list of all values.

 Recent Searches
 Choose from recent searches

 Saved Searches
 Choose from saved searches

Empl ID

begins with

Empl Record

=

Name

begins with

Last Name

begins with

Second Last Name

begins with

Alternate Character Name

begins with

 Show fewer options

☐ Case Sensitive

Search

Clear

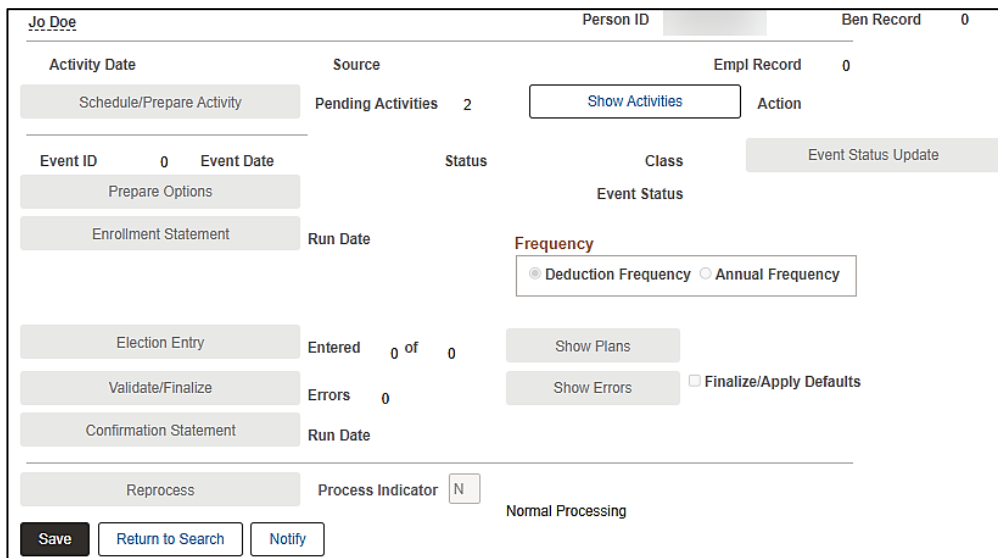


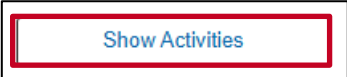
Benefits Job Aid

BN361 Employee Set Up for Medicare

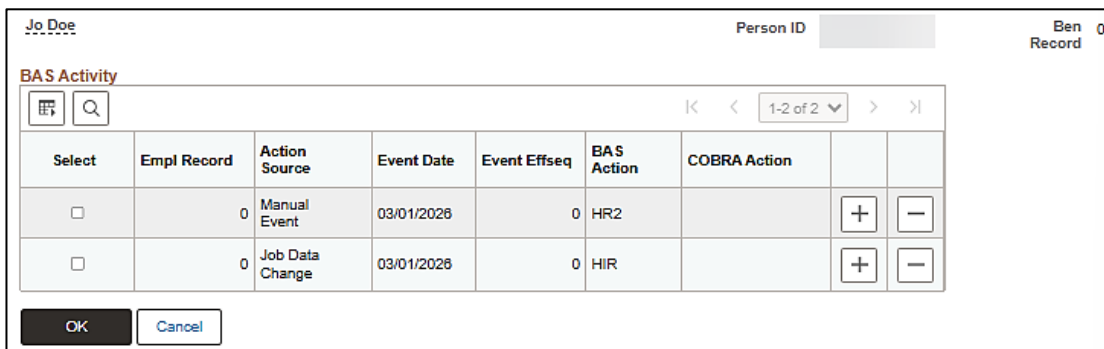
Step	Action
79.	Enter the Employee ID of the dependent just hired in the Empl ID field. 
80.	Click the Search button. 

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



81.	Click the Show Activities button. 
-----	---

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



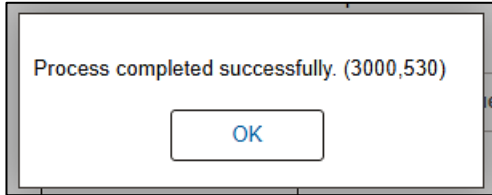
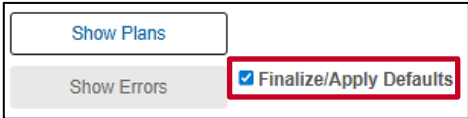
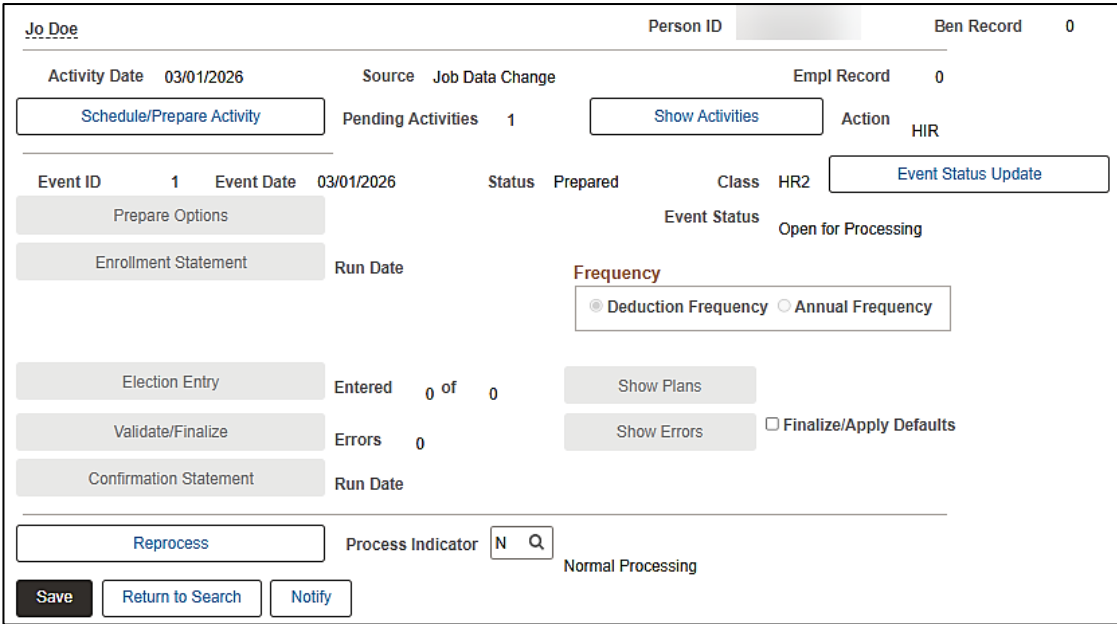


Benefits Job Aid

BN361 Employee Set Up for Medicare

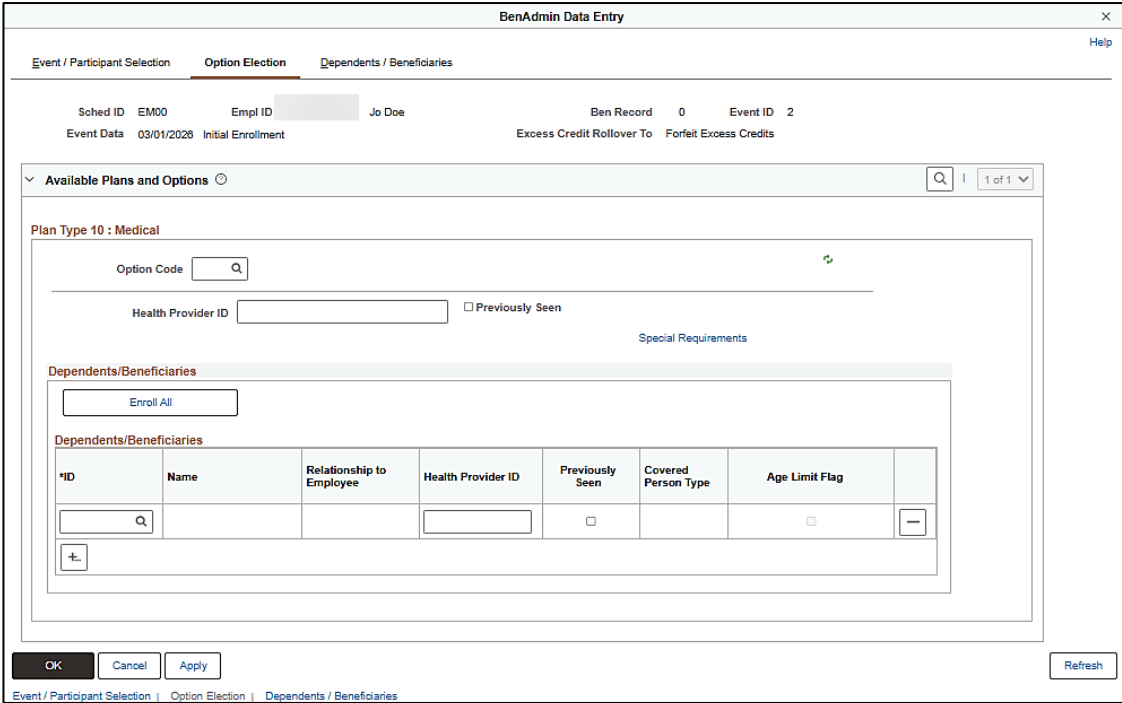
Step	Action																											
82.	Select the “HR2” BAS Action checkbox. BAS Activity 1-2 of 2 <table><tr><th>Select</th><th>Empl Record</th><th>Action Source</th><th>Event Date</th><th>Event Effseq</th><th>BAS Action</th><th>COBRA Action</th><th></th><th></th></tr><tr><td>☒</td><td>0</td><td>Manual Event</td><td>03/01/2026</td><td>0</td><td>HR2</td><td></td><td>+</td><td>-</td></tr><tr><td>☐</td><td>0</td><td>Job Data Change</td><td>03/01/2026</td><td>0</td><td>HIR</td><td></td><td>+</td><td>-</td></tr></table>	Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action			☒	0	Manual Event	03/01/2026	0	HR2		+	-	☐	0	Job Data Change	03/01/2026	0	HIR		+	-
Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action																						
☒	0	Manual Event	03/01/2026	0	HR2		+	-																				
☐	0	Job Data Change	03/01/2026	0	HIR		+	-																				
83.	Click the OK button. OK Cancel																											
The On-Demand Event Process redisplay. Jo Doe Person ID Ben Record 0 Activity Date 03/01/2026 Source Manual Event Empl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HR2 Event ID 0 Event Date Status Class Event Status Update Prepare Options Enrollment Statement Run Date Frequency Deduction Frequency Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify																												
84.	Click the Schedule/Prepare Activity button to manually run the Benefits Administration process for this Benefit Event. Schedule/Prepare Activity																											



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 redisplay with the HIR Event. 	

Step	Action
88.	Click the Schedule/Prepare Activity button to manually run the Benefits Administration process for this Benefit Event. Schedule/Prepare Activity
The On-Demand Event Process page redisplays. <u>Jo Doe</u> Person ID Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 03/01/2026 Status Prepared Class HIR Event Status Update Prepare Options Enrollment Statement Run Date Event Status Open for Processing Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 1 Validate/Finalize Errors 0 Confirmation Statement Run Date Show Plans Show Errors ☐ Finalize/Apply Defaults Reprocess Process Indicator N Save Return to Search Notify Normal Processing	
89.	Click the Election Entry button. Election Entry

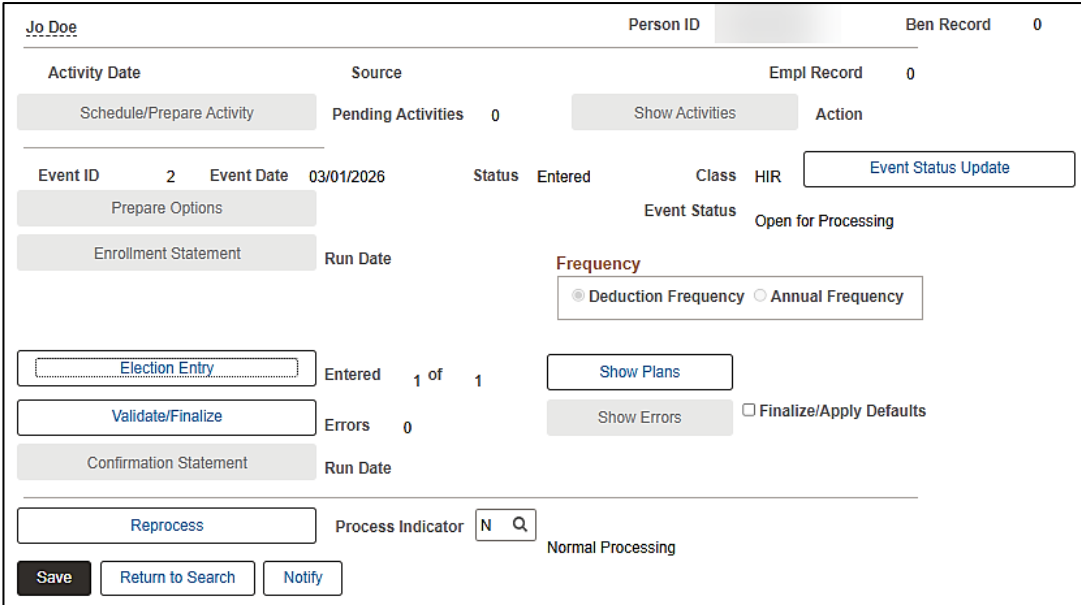
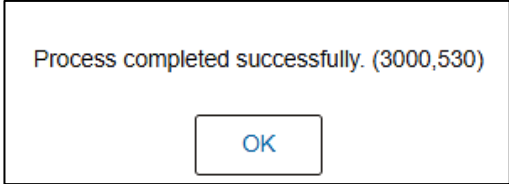


Step	Action
	The BenAdmin Data Entry page displays with the Option Election tab displayed by default. 
90.	Click the Option Code Look up icon in the Plan Type 10: Medical section and select the applicable Option Code. In this example, Option Code “1” is selected – “COVA HlthAwr + Prev Den (CHA) (Single)”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



Benefits Job Aid

BN361 Employee Set Up for Medicare

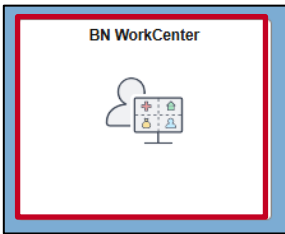
Step	Action
	The On-Demand Event Process page redisplay. 
92.	Click the Validate/Finalize button. 
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
93.	Click the OK button. 

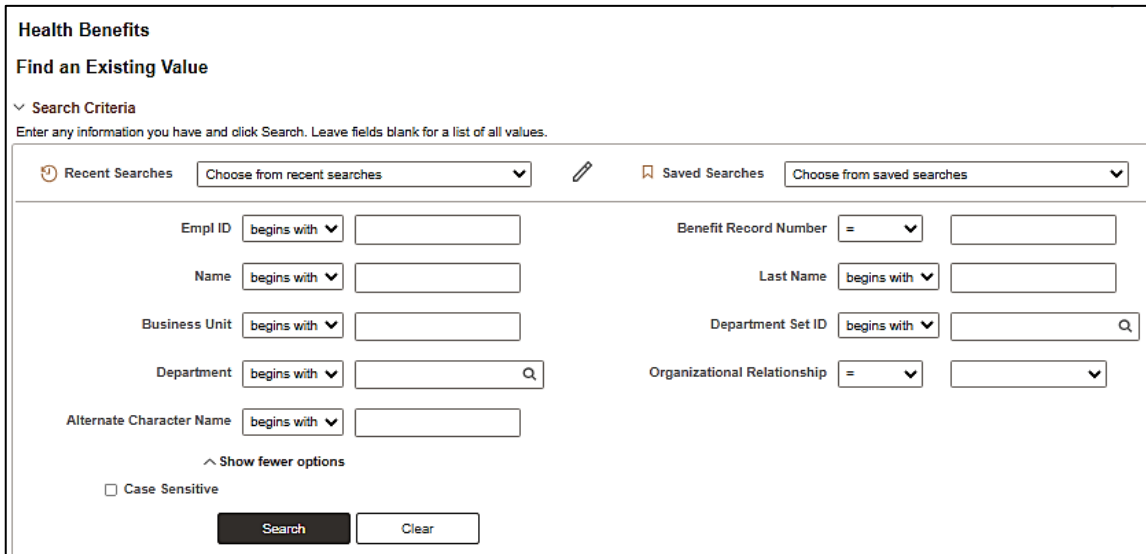
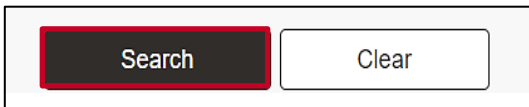
Step	Action
	The On-Demand Event Process page redisplay. Jo Doe Person ID Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 03/01/2026 Status Finalized - Enrolled Class HIR Event Status Update Prepare Options Event Status Closed to Processing Enrollment Statement Run Date Frequency Deduction Frequency Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify
	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.

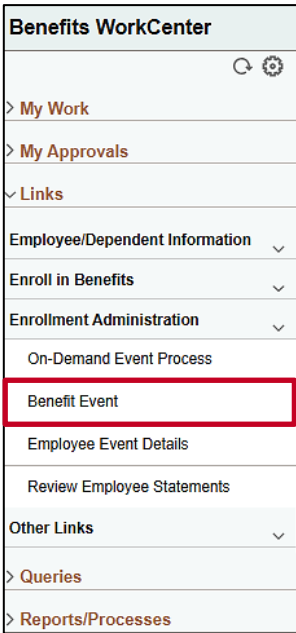
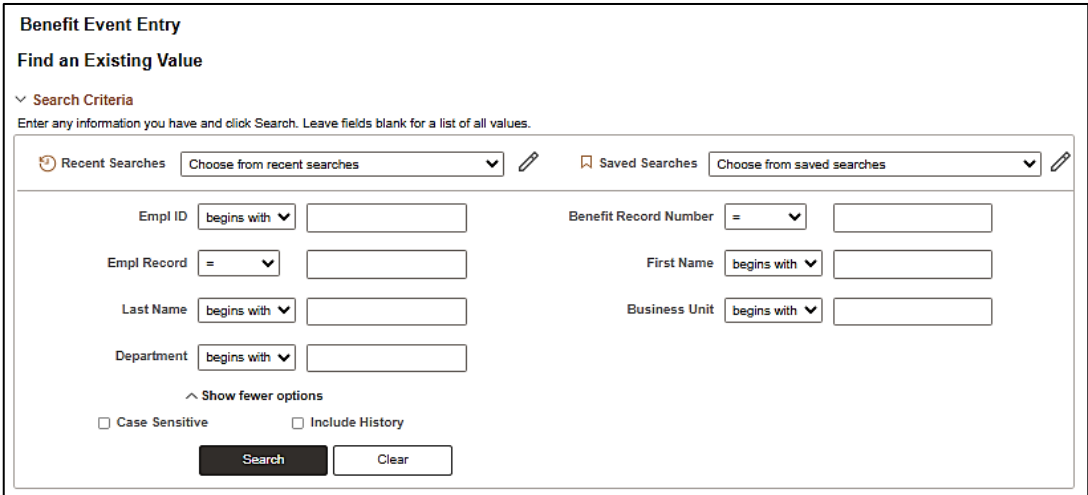
Process the Medicare Manual Event

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. 

Step	Action
	Users can also access the Health Plan Enrollment page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Health Plan Enrollment
	The Health Benefits 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.
3.	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. 
4.	Click the Search button. 



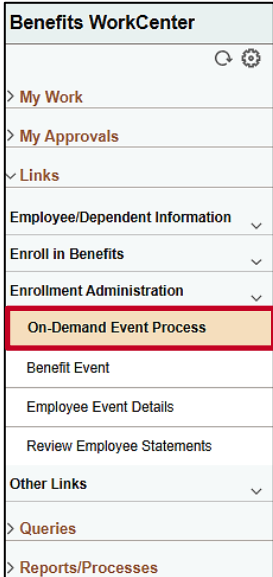
Step	Action																																	
	The Search Results display. ▼ Search Results 2 results - Empl ID <table border="1"><thead><tr><th>Empl ID</th><th>Benefit Record Number</th><th>Name</th><th>Name</th><th>Last Name</th><th>Business Unit</th><th>Department</th><th>Organizational Relationship</th><th>Primary Empl Record</th><th>Alternate Character Name</th><th></th></tr></thead><tbody><tr><td> </td><td>0</td><td>JOHN DOE</td><td>JOHN DOE</td><td>DOE</td><td>23600</td><td>1000</td><td>Emp</td><td>0</td><td>(blank)</td><td>></td></tr><tr><td> </td><td>1</td><td>JOHN DOE</td><td>JOHN DOE</td><td>DOE</td><td>23600</td><td>99999</td><td>Emp</td><td>1</td><td>(blank)</td><td>></td></tr></tbody></table>	Empl ID	Benefit Record Number	Name	Name	Last Name	Business Unit	Department	Organizational Relationship	Primary Empl Record	Alternate Character Name			0	JOHN DOE	JOHN DOE	DOE	23600	1000	Emp	0	(blank)	>		1	JOHN DOE	JOHN DOE	DOE	23600	99999	Emp	1	(blank)	>
Empl ID	Benefit Record Number	Name	Name	Last Name	Business Unit	Department	Organizational Relationship	Primary Empl Record	Alternate Character Name																									
	0	JOHN DOE	JOHN DOE	DOE	23600	1000	Emp	0	(blank)	>																								
	1	JOHN DOE	JOHN DOE	DOE	23600	99999	Emp	1	(blank)	>																								
5.	Click the Drill In (>) icon on any row in the Search Results.. <table border="1"><thead><tr><th>Empl ID</th><th>Benefit Record Number</th><th>Name</th><th>Name</th><th>Last Name</th><th>Business Unit</th><th>Department</th><th>Organizational Relationship</th><th>Primary Empl Record</th><th>Alternate Character Name</th><th></th></tr></thead><tbody><tr><td> </td><td>0</td><td>JOHN DOE</td><td>JOHN DOE</td><td>DOE</td><td>23600</td><td>1000</td><td>Emp</td><td>0</td><td>(blank)</td><td>></td></tr><tr><td> </td><td>1</td><td>JOHN DOE</td><td>JOHN DOE</td><td>DOE</td><td>23600</td><td>99999</td><td>Emp</td><td>1</td><td>(blank)</td><td>></td></tr></tbody></table>	Empl ID	Benefit Record Number	Name	Name	Last Name	Business Unit	Department	Organizational Relationship	Primary Empl Record	Alternate Character Name			0	JOHN DOE	JOHN DOE	DOE	23600	1000	Emp	0	(blank)	>		1	JOHN DOE	JOHN DOE	DOE	23600	99999	Emp	1	(blank)	>
Empl ID	Benefit Record Number	Name	Name	Last Name	Business Unit	Department	Organizational Relationship	Primary Empl Record	Alternate Character Name																									
	0	JOHN DOE	JOHN DOE	DOE	23600	1000	Emp	0	(blank)	>																								
	1	JOHN DOE	JOHN DOE	DOE	23600	99999	Emp	1	(blank)	>																								
	The Health Plan Enrollment page displays for the selected retiree. JOHN DOE Employee ID Benefit Record Number 1 Plan Type 10 Medical Coverage 1 of 1 Coverage Begin Date 01/01/2026 Deduction Begin Date 01/01/2026 Coverage Election ☒ Elect ☐ Waive ☐ Terminate Election Date 12/22/2025 Benefit Program RET Retiree Benefit Plan CHA1 COVA HlthAwr + Exp Den&Vis Option Code 6 Coverage Code 2 Self + Spouse Health Provider ID ☐ Previously Seen Employee Status Active Enroll All Dependents Dependent/Beneficiaries 1-1 of 1 <table border="1"><thead><tr><th>ID</th><th>Name</th><th>Relationship to Employee</th><th>Health Provider ID</th><th>Prev Seen</th><th>Covered Person Type</th><th>Age Limit Flg</th></tr></thead><tbody><tr><td>01</td><td>JO DOE</td><td>Spouse</td><td></td><td>☐</td><td>Spouse</td><td>N</td></tr></tbody></table> Save Return to Search Previous in List Next in List Notify Refresh	ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg	01	JO DOE	Spouse		☐	Spouse	N																			
ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg																												
01	JO DOE	Spouse		☐	Spouse	N																												

Step	Action
	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 
	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. 	



Step	Action
7.	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. Empl ID begins with ▾
8.	Click the Search button. Search Clear
The Benefit Event Detail page displays for the selected retiree. Benefit Event Detail JOHN DOE Employee ID Benefit Record Number 1 Life Event Life Event Life Event Date Paperwork Receipt Date Health Change FSA Change Special Processing Message (Health) Special Processing Message (FSA) Save Return to Search	
9.	Click the Life Event dropdown button and select “EE/Dep. Gained Eligibility – Medicare/Medicaid” list item. Life Event Life Event

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. Life Event EE/Dep. Gained Eligibility - Medicare/Medicaid Life Event Date
11.	Enter the Paperwork Receipt Date. Paperwork Receipt Date
12.	Click the Health Change Needed dropdown button and select "Yes". Health Change Health Change Needed: Yes
13.	Click the Future Cov. Level dropdown button and select "Single, Employee". Future Cov. Level: Single, Employee
14.	Click the Change dropdown button and select "Retiree or Retiree Dependent gained Medicare Eligibility". Change: Retiree or Retiree Dependent gained Medicare Eligibility
15.	Click the Save button. Save Return to Search
A Special Processing Message (Health) displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created. Special Processing Message (Health) A GEM event will be created for you to: Enroll the retiree in Medicare or Remove the Medicare eligible dependent from existing plan or Remove the Medicare eligible dependent and change plans	
	Now that the GEM Event has been created, it must be processed.

Step	Action
16.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > On-Demand Event Process 
	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.

On-Demand Event Maintenance
Find an Existing Value
Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

 Recent Searches
Choose from recent searches

 Saved Searches
Choose from saved searches

Empl ID
begins with

Empl Record
=

Name
begins with

Last Name
begins with

Second Last Name
begins with

Alternate Character Name
begins with

^ Show fewer options
☐ Case Sensitive

Search

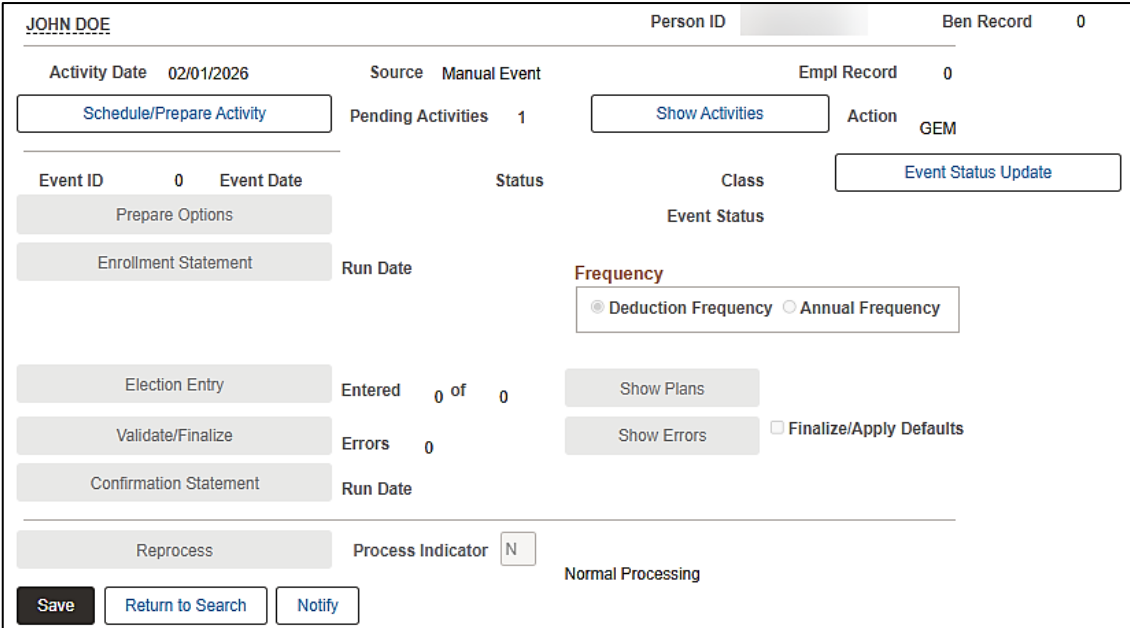
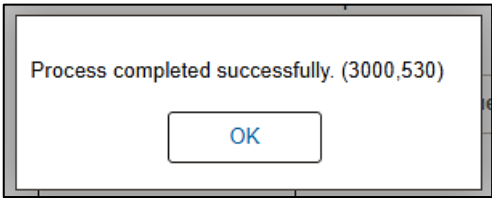
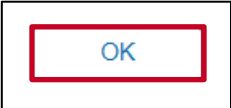
Clear



Step	Action																											
17.	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. Empl ID begins with ▾																											
18.	Click the Search button. Search Clear																											
19.	The Search Results display. ▼ Search Results 2 results - Empl ID << < 1-2 of 2 ▾ > >> View All <table><tr><th>Empl ID</th><th>Empl Record</th><th>Name</th><th>First Name</th><th>Last Name</th><th>Second Last Name</th><th>Alternate Character Name</th><th>Middle Name</th><th></th></tr><tr><td></td><td>0</td><td>JOHN DOE</td><td>JOHN</td><td>DOE</td><td>(blank)</td><td>(blank)</td><td>(blank)</td><td>></td></tr><tr><td></td><td>1</td><td>JOHN DOE</td><td>JOHN</td><td>DOE</td><td>(blank)</td><td>(blank)</td><td>(blank)</td><td>></td></tr></table>	Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name			0	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>		1	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>
Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name																					
	0	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>																				
	1	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>																				
20.	Click the Drill In (>) icon on the highest numbered job record row. <table><tr><th>Empl ID</th><th>Empl Record</th><th>Name</th><th>First Name</th><th>Last Name</th><th>Second Last Name</th><th>Alternate Character Name</th><th>Middle Name</th><th></th></tr><tr><td></td><td>0</td><td>JOHN DOE</td><td>JOHN</td><td>DOE</td><td>(blank)</td><td>(blank)</td><td>(blank)</td><td>></td></tr><tr><td></td><td>1</td><td>JOHN DOE</td><td>JOHN</td><td>DOE</td><td>(blank)</td><td>(blank)</td><td>(blank)</td><td>></td></tr></table>	Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name			0	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>		1	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>
Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name																					
	0	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>																				
	1	JOHN DOE	JOHN	DOE	(blank)	(blank)	(blank)	>																				



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 redisplay. 
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 redisplay. JOHN DOE Person ID Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 5 Event Date 02/01/2026 Status Prepared Class GEM Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 2 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Q Normal Processing Save Return to Search Notify



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

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

BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] JOHN DOE Ben Record 0 Event ID 5
Event Data 02/01/2026 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 46 COVA+ExDen+Out-of-ntwk+Vs&Hr (ACC5) (Self + Spouse)

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

Dependents/Beneficiaries

[Enroll All](#)

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
05	JO DOE	Spouse		☐	Spouse	☐

Plan Type AY : Health Premium Reward

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

Plan Type 10 : Medical

Option Code

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

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

Look Up Option Code

Cancel

Help

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

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 redisplay with the selected Option Code displayed.

Plan Type 10 : Medical

Option Code

1

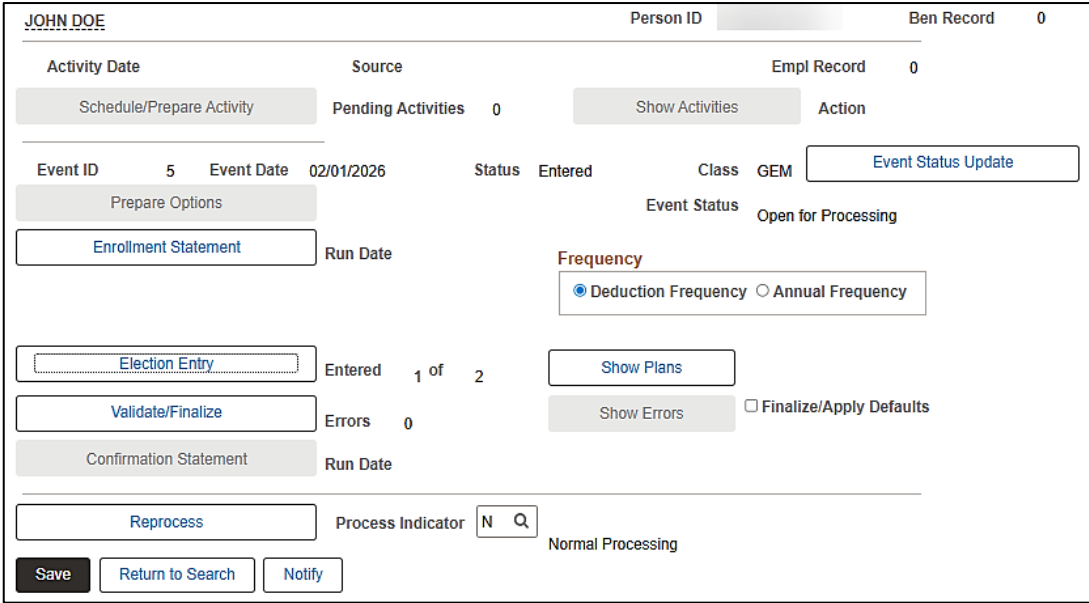
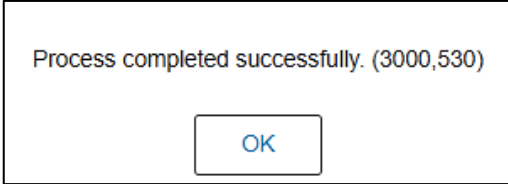
Q

COVA HlthAwr + Prev Den (CHA) (Single)

Step	Action																
28.	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. Event / Participant Selection Option Election Dependents / Beneficiaries																
29.	From the Option Election page, click the Delete Row (-) icon to remove the spouse in the Dependent/Beneficiaries section. Dependents/Beneficiaries <table><tr><th>*ID</th><th>Name</th><th>Relationship to Employee</th><th>Health Provider ID</th><th>Previously Seen</th><th>Covered Person Type</th><th>Age Limit Flag</th><th></th></tr><tr><td>05</td><td>JO DOE</td><td>Spouse</td><td></td><td>☐</td><td>Spouse</td><td>☐</td><td> - </td></tr></table>	*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		05	JO DOE	Spouse		☐	Spouse	☐	-
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag											
05	JO DOE	Spouse		☐	Spouse	☐	-										
	Optionally, users can click the Enroll All button to remove the spouse. Dependents/Beneficiaries Enroll All																
A Warning message displays in a pop-up window when the row is manually deleted. Delete current/selected rows from this page? The delete will occur when the transaction is saved. OK Cancel																	
30.	Click the OK button. OK Cancel																



Step	Action																
	The Option Election page redisplay with spouse removed from the Dependents/Beneficiaries section. BenAdmin Data Entry Event / Participant Selection Option Election Dependents / Beneficiaries Sched ID EM00 Empl ID [REDACTED] JOHN DOE Ben Record 0 Event ID 5 Event Data 02/01/2026 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits Available Plans and Options ⓘ 1 of 2 Plan Type 10 : Medical Option Code 1 COVA HlthAwr + Prev Den (CHA) (Single) Health Provider ID ☐ Previously Seen Special Requirements Dependents/Beneficiaries Enroll All <table border="1"><thead><tr><th>ID</th><th>Name</th><th>Relationship to Employee</th><th>Health Provider ID</th><th>Previously Seen</th><th>Covered Person Type</th><th>Age Limit Flag</th><th></th></tr></thead><tbody><tr><td> </td><td></td><td></td><td> </td><td>☐</td><td></td><td>☐</td><td> - </td></tr></tbody></table>	ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag						☐		☐	-
ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag											
				☐		☐	-										
31.	Click the OK button. OK Cancel Apply																

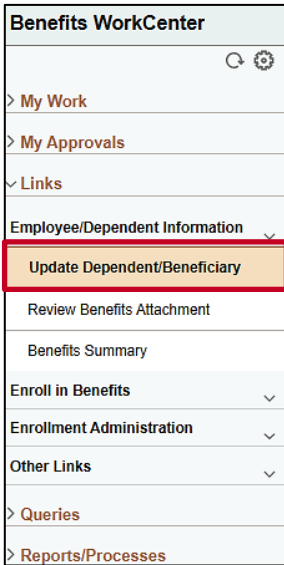
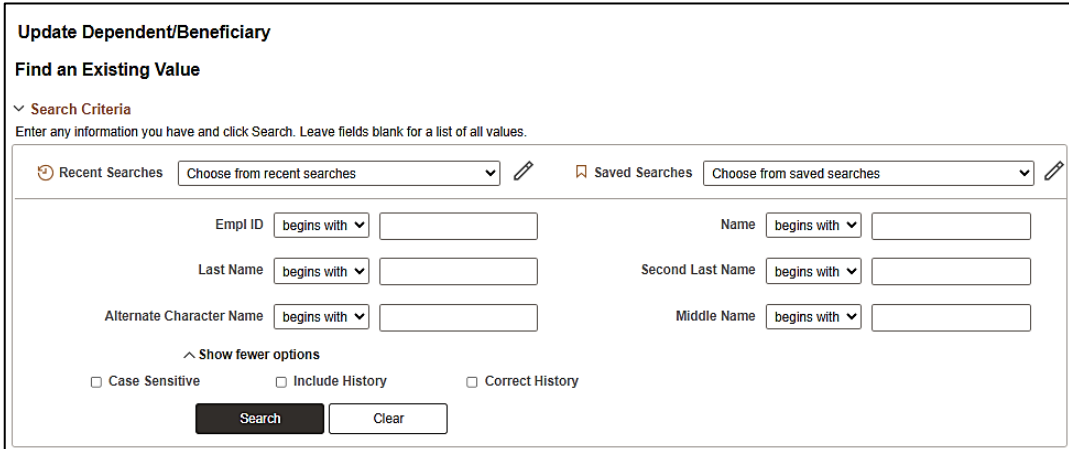
Step	Action
	The On-Demand Event Process page redisplay. 
32.	Click the Validate/Finalize button. 
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
33.	Click the OK button to close the message. 



Step	Action
The On-Demand Event Process redispays.	
JOHN DOE Activity Date Schedule/Prepare Activity Person ID Ben Record 0 Source Pending Activities 0 Empl Record 0 Show Activities Action Event ID 5 Event Date 02/01/2026 Status Finalized - Enrolled Class GEM Event Status Update Prepare Options Event Status Closed to Processing Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify	

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.

Step	Action
1.	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
The Update Dependent/Beneficiary Find an Existing Value Search page displays. 	



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.

Empl ID

begins with

3.

Click the **Search** button.

Search

Clear

The Search Results display.

▼ Search Results

2 results - Empl ID

1-2 of 2

View All

Empl ID	Name	First Name	Last Name	Middle Name	Business Unit	Company	HR Status	Payroll Status	
	JOHN DOE	JOHN	DOE	(blank)	23800	VCU	Active	Active	>
	JOHN DOE	JOHN	DOE	(blank)	23800	VCU	Inactive	Retired	>

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)	23800	VCU	Active	Active	>
	JOHN DOE	JOHN	DOE	(blank)	23800	VCU	Inactive	Retired	>



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

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

Name Address Personal Profile

JOHN DOE Person ID [REDACTED]

Dependent/Beneficiaries

*Dependent/Beneficiary ID 01

Name History

Effective Date 01/01/1901
Format Type English
Display Name JO DOE

View Name

Save Return to Search Notify Update/Display Include History Correct History

Name | Address | Personal Profile

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

Name Address **Personal Profile**

The **Personal Profile** page displays.

Name Address **Personal Profile**

JOHN DOE Person ID [REDACTED]

Personal Profile

Dependent/Beneficiary ID 05 JOHN DOE

*Date of Birth 02/15/1961 Birth Location [REDACTED]
Birth Country [REDACTED] Birth State [REDACTED]
Date of Death [REDACTED] ☐ Riders/Orders exist
Medicare Entitled Date [REDACTED] Riders/Orders

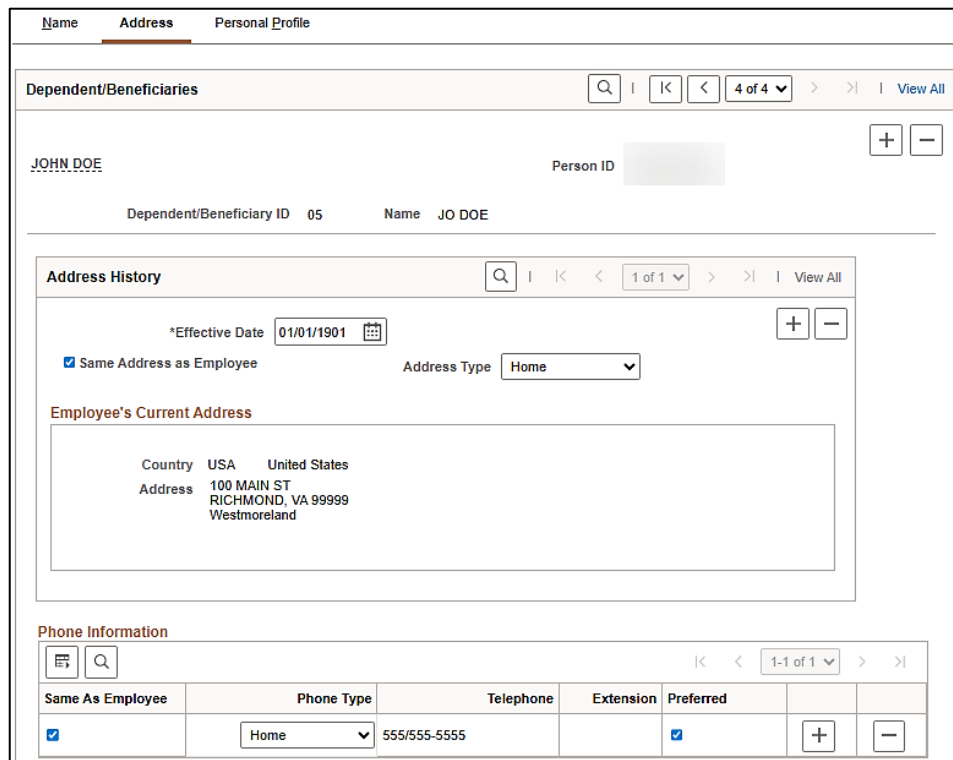
Personal History

*Effective Date 01/01/1901
*Relationship to Employee Spouse
*Dependent Beneficiary Type Approved Dependent
*Gender Female
*Marital Status Married
As of 01/01/1901
☐ Student
☐ Disabled
☐ Smoker
Occupation [REDACTED]

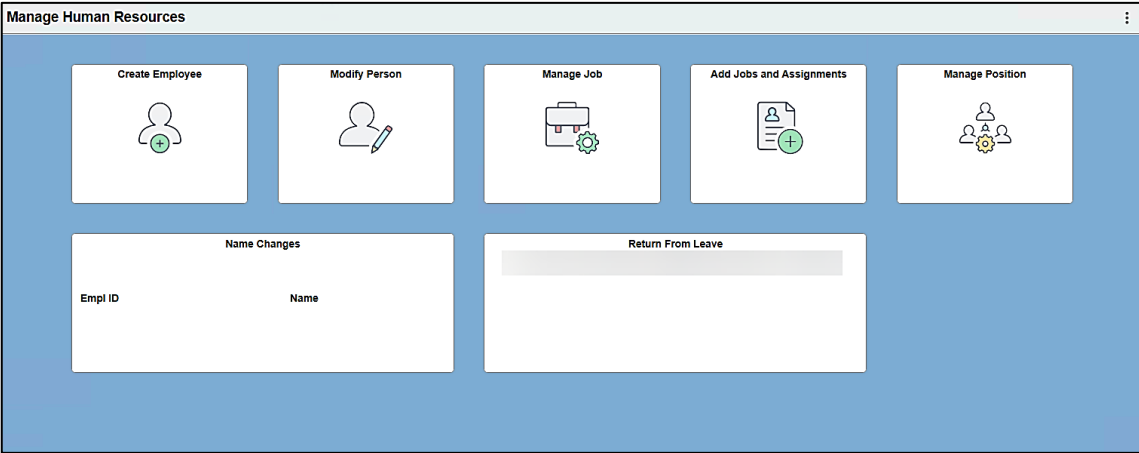
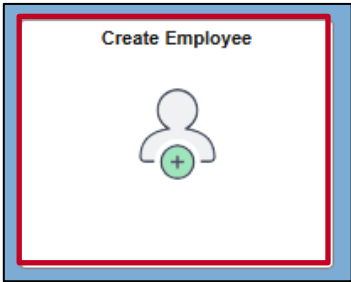
USA
National ID

Step	Action
6.	Click the Show next row arrow until the Personal Profile for the spouse is reached. 
7.	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.
8.	Click the Address tab to review the Address information for the spouse. 

The **Address** page for the spouse displays.



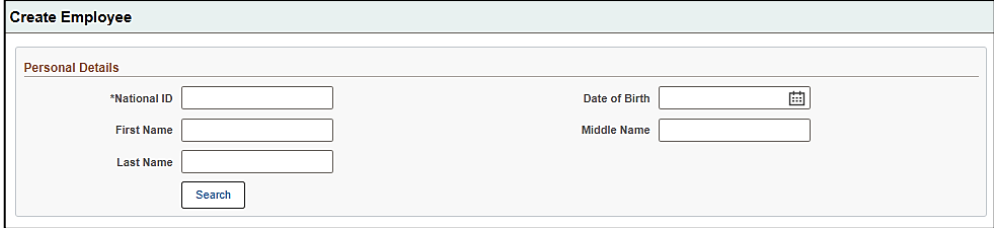
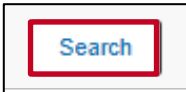
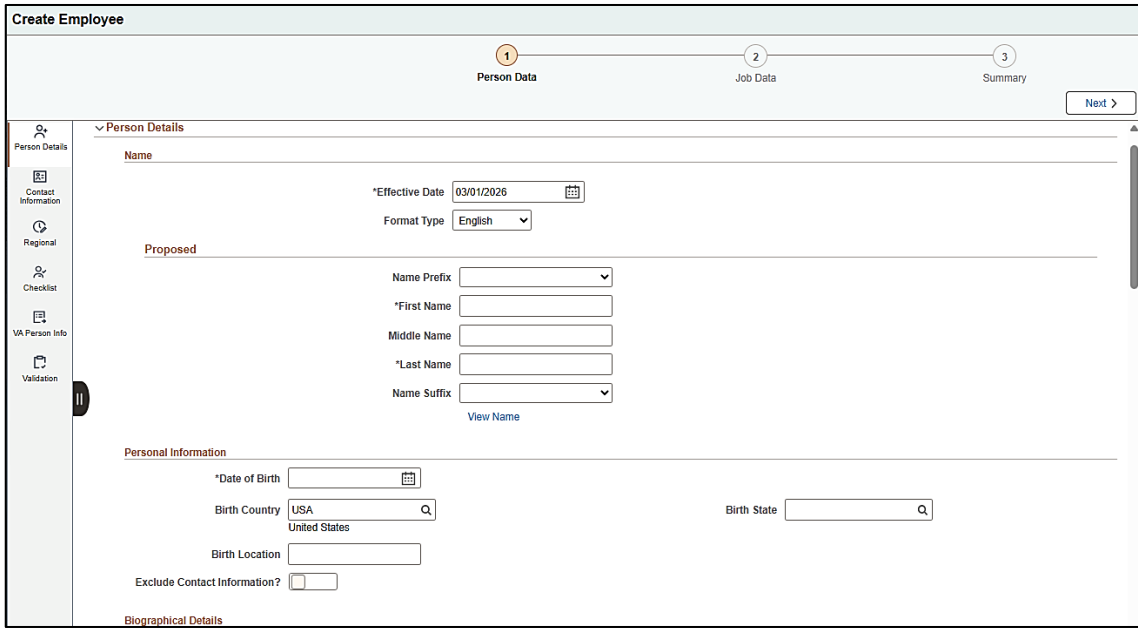
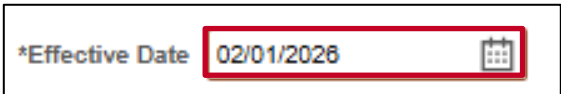
9.	Confirm that the information on this page is accurate for the spouse. Note: This information will be used to hire the dependent as an employee (the spouse in this scenario).
----	---

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. 

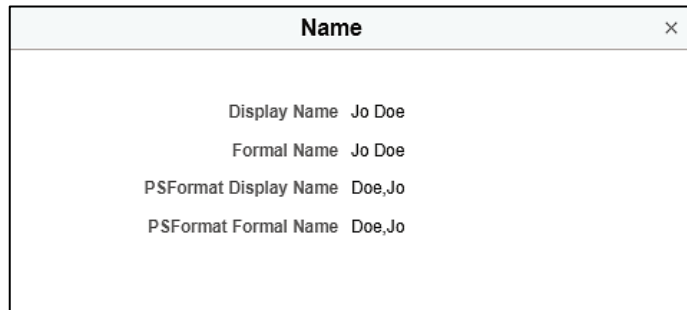
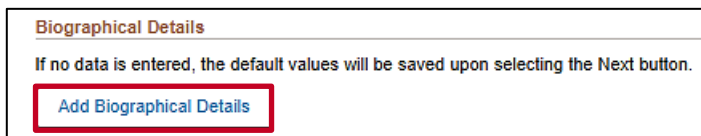
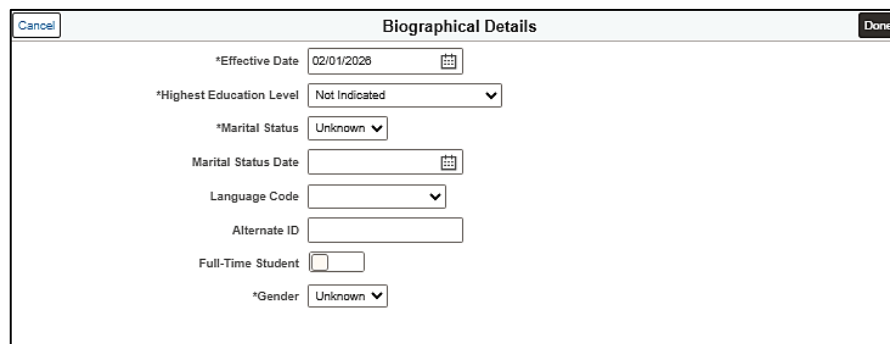


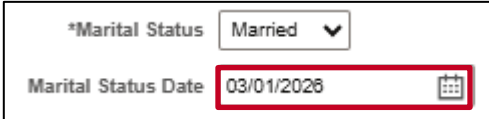
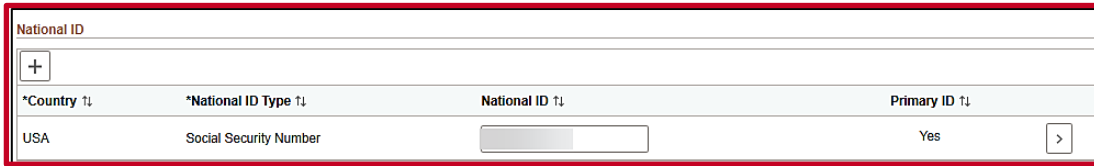
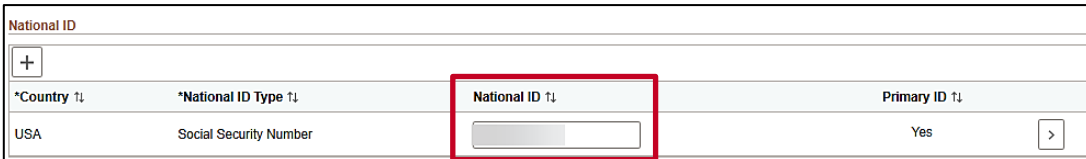
Benefits Job Aid

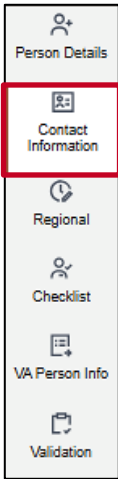
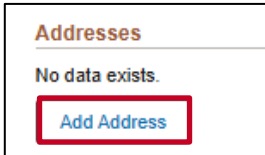
BN361 Employee Set Up for Medicare

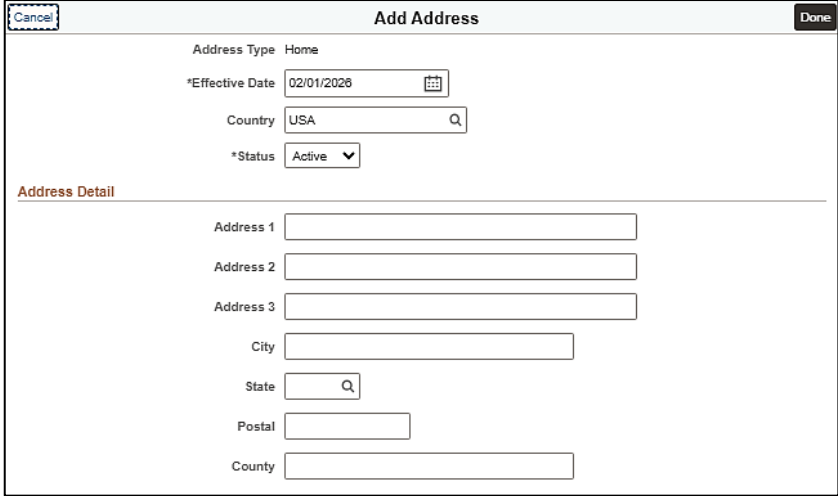
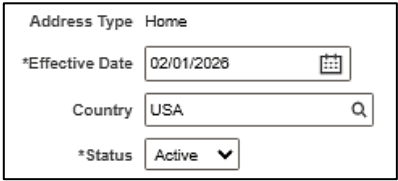
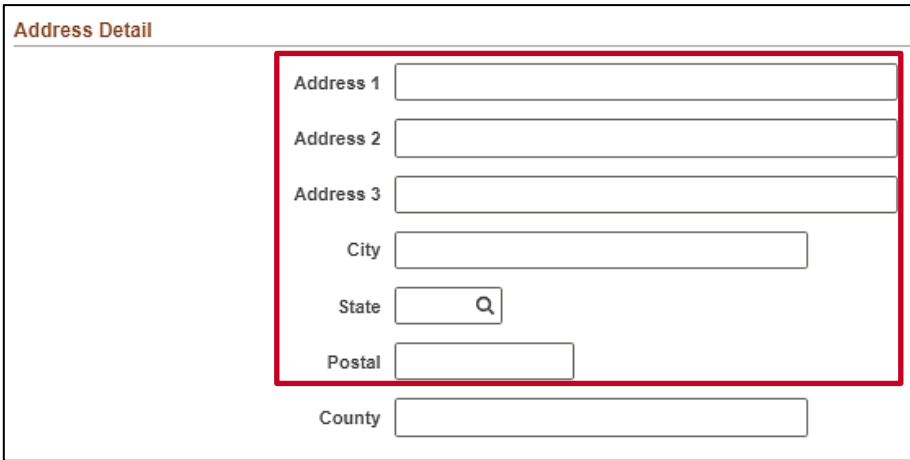
Step	Action
	The Create Employee Search page displays. 
12.	Enter the dependent's SSN in the National ID field. 
13.	Click the Search button. 
	The Create Employee page displays with the Person Details tab (Step 1 of 3: Person Data) displayed by default. 
14.	The Effective Date field defaults to today's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

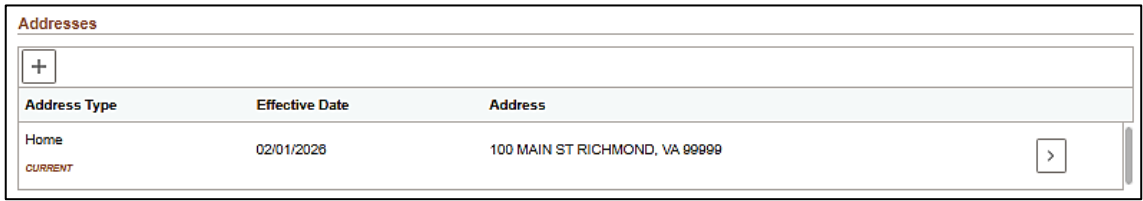
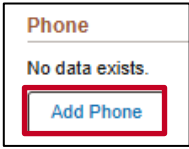
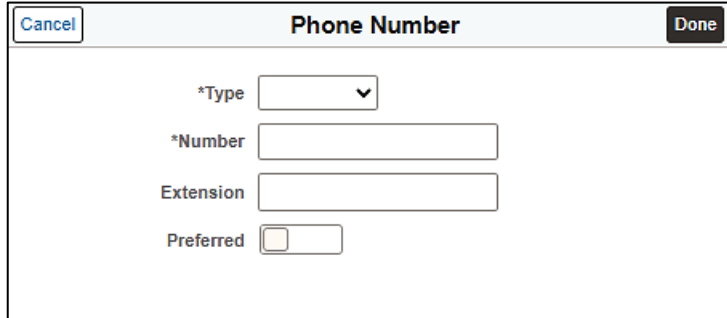
Step	Action
	The Effective Date cannot be greater than today's date when creating or modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled HR351 Overview of Effective Dating . This Job Aid can be found on the Cardinal website in Job Aids under Learning .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

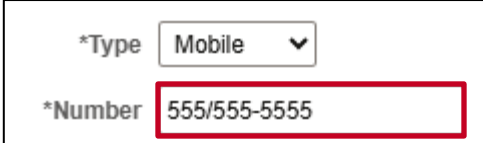
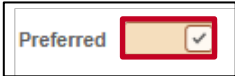
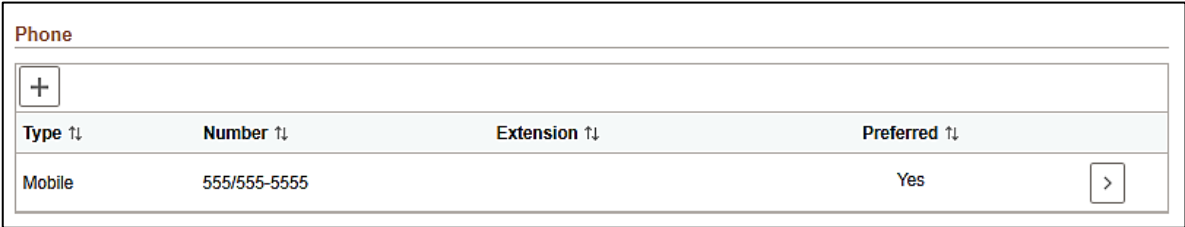
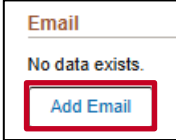
Step	Action
	The Name page displays in a pop-up window. Note: After reviewing, click the “X” button to close the pop-up window and adjust the name fields if needed. 
21.	Scroll down to the Personal Information section and click the Date of Birth Calendar icon to select the dependent’s date of birth (required). 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.

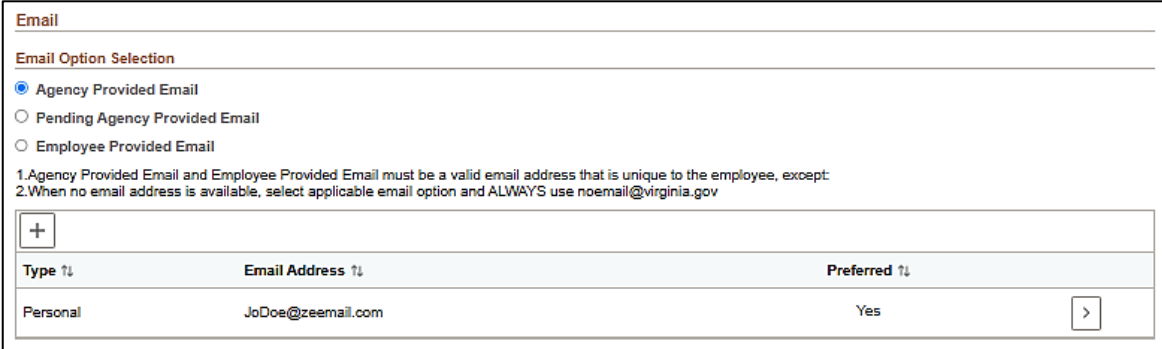
Step	Action
23.	Click the Marital Status dropdown button and select the dependent's legal marital status. 
	When a selection is made in the Marital Status field, the Marital Status Date updates to the Effective Date above. Do not change. 
24.	The Language Code, Alternate ID, and Full-Time Student fields 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. 

Step	Action
28.	Click the Contact Information tab or use the scroll bar to scroll to the Contact Information section. 
The Contact Information section displays. 	
29.	Click the Add Address button in the Addresses section. 

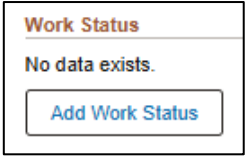
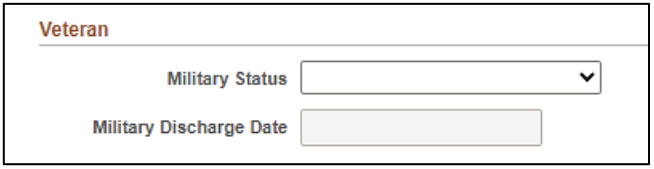
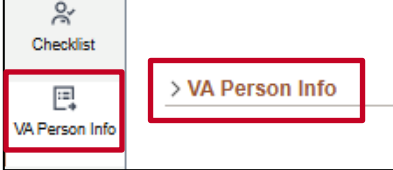
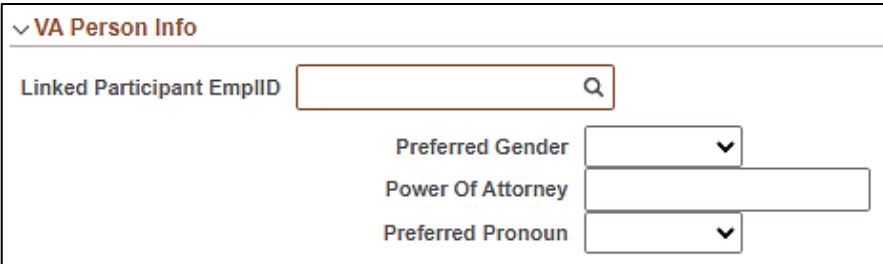
Step	Action
	The Add Address page displays in a pop-up window. 
	The top section of the Add Address page auto-populates. Do not change. An Address Type of “Home” is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address.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

Step	Action
	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.
31.	Click the Done button once the applicable Address Detail information has been entered. 
The Addresses section redispays. 	
32.	Click the Add Phone button in the Phone section. 
The Phone Number page displays in a pop-up window. 	
33.	Click the Type dropdown button and select the type of phone number being entered. 

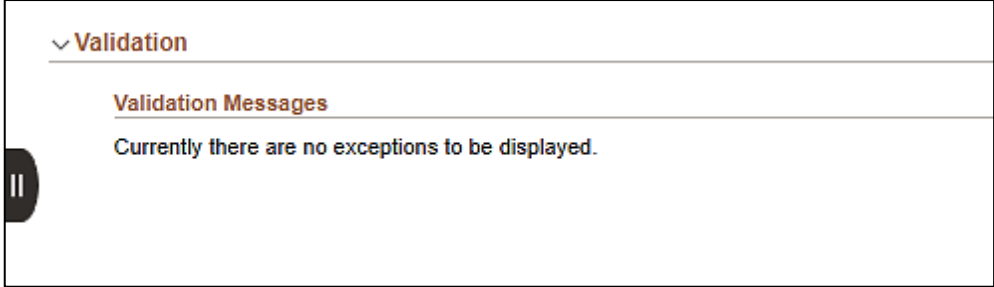
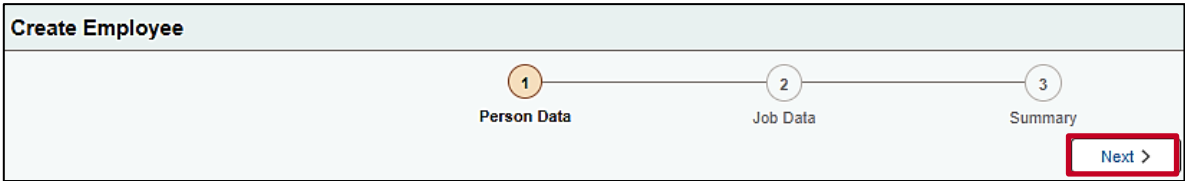
Step	Action
34.	Enter the dependent's phone number in the Number field. 
	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.
35.	Select the Preferred field toggle to identify the dependent's preferred phone number. 
36.	Click the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

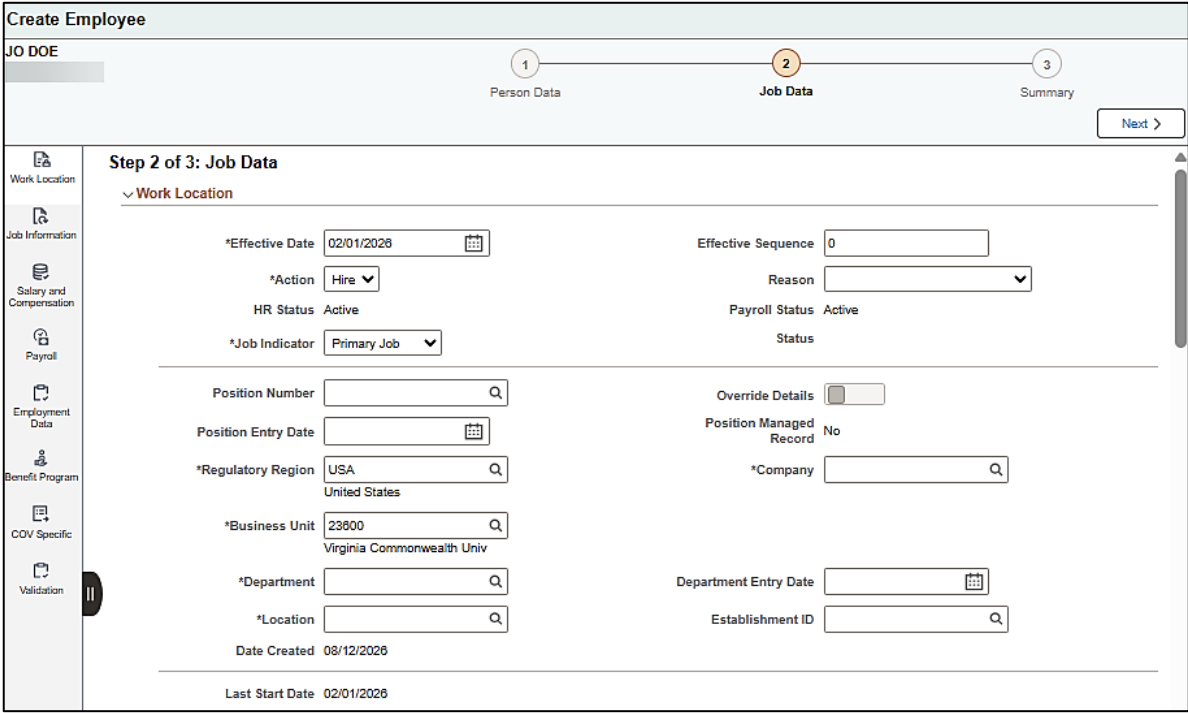
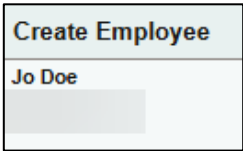
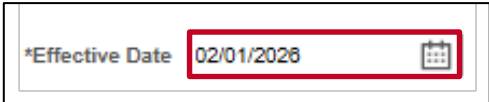
Step	Action
	The Email Address page displays in a pop-up window. 
38.	Click the Email Type dropdown button and select "Personal". 
39.	Enter the email address in the Email Address field 
	When no email address is available, use noemail@virginia.gov. This can be replaced with a personal email address 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 redisplay. 

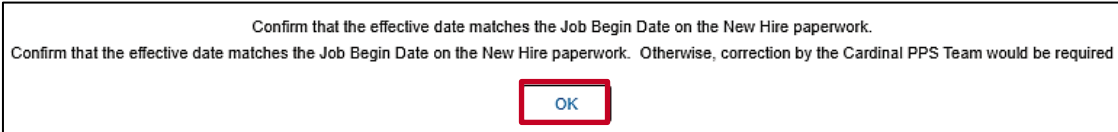
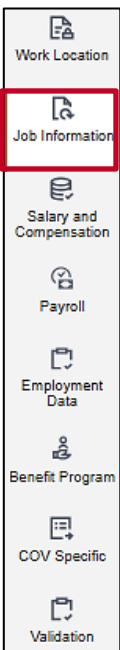
Step	Action													
41.	Select the Employee Provided Email radio button option in the Email Option Selection section. Email Option Selection ☐ Agency Provided Email ☐ Pending Agency Provided Email ☒ Employee Provided Email 1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except: 2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov													
42.	Click the Regional tab. Person Details Contact Information Regional Checklist VA Person Info Validation													
The Regional section displays. Regional USA Ethnic Group <table><thead><tr><th>Regulatory Region</th><th>Ethnic Group</th><th>Primary</th></tr></thead><tbody><tr><td>USA</td><td></td><td>☐</td></tr><tr><td>United States</td><td></td><td></td></tr></tbody></table> Work Status No data exists. Add Work Status Smoker History <table><thead><tr><th>Smoker</th><th>Smoker Status Date</th></tr></thead><tbody><tr><td>No</td><td></td></tr></tbody></table> CheckList Select Checklist Code Hire		Regulatory Region	Ethnic Group	Primary	USA		☐	United States			Smoker	Smoker Status Date	No	
Regulatory Region	Ethnic Group	Primary												
USA		☐												
United States														
Smoker	Smoker Status Date													
No														

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.
43.	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. 
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. Linked Participant EmplID
	The VA Person Info page redisplay with the Click here to add Other Linked Participant Details link displayed. VA Person Info Linked Participant EmplID Click here to add Other Linked Participant Details Preferred Gender Power Of Attorney Preferred Pronoun
	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. Person Details Contact Information Regional Checklist VA Person Info Validation

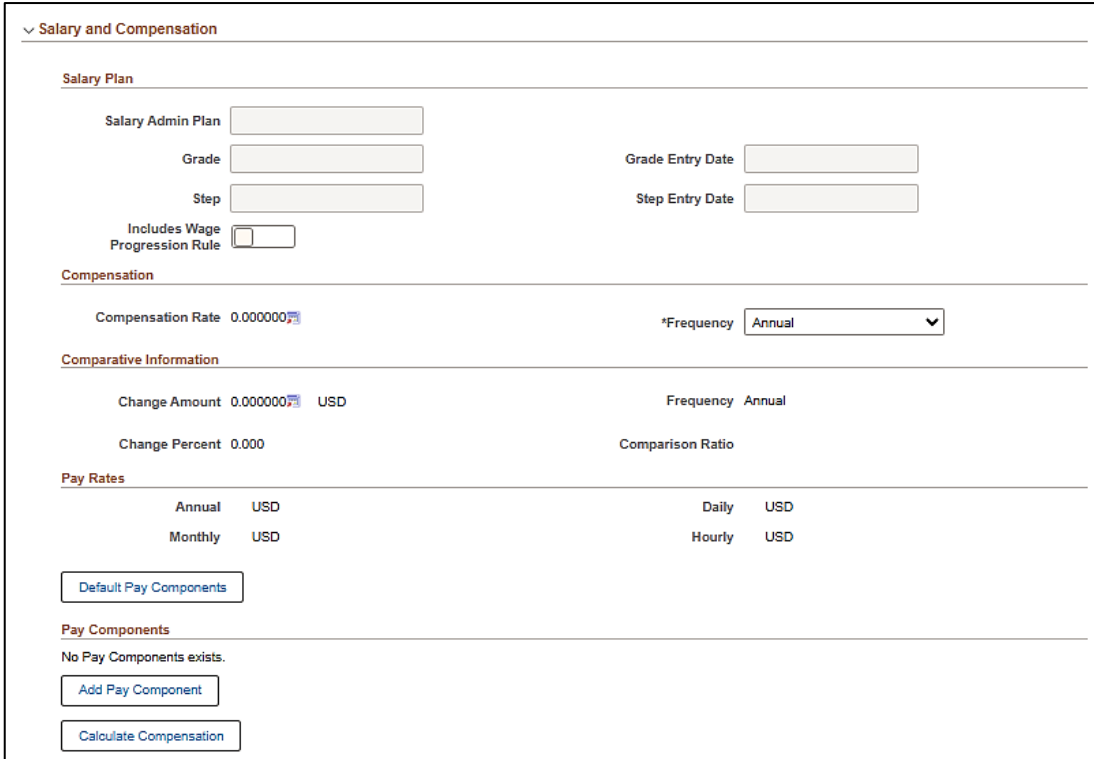
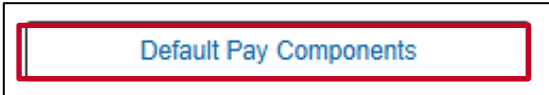
Step	Action
	The Validation section displays. 
48.	Click the Next button on the right side of the page at the top. 
	This is the step where information entered for the employee's Personal Data is validated. If there is any missing required information, Cardinal will generate an alert. Note: Do not click 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.

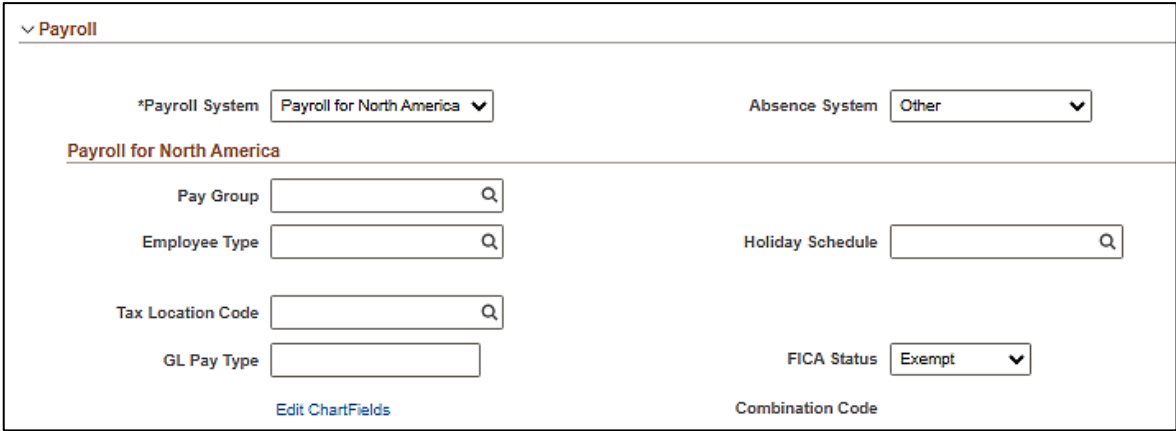
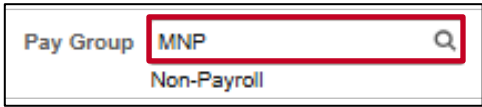
Step	Action
	The Create Employee (Step 2 of 3: Job Data) page displays with the Work Location tab displayed by default. 
49.	Cardinal will auto-assign the Employee ID Number for the dependent. Make note of the assigned Employee ID Number for future use. Note: This number is located at the top of the 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, "Hir 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. 



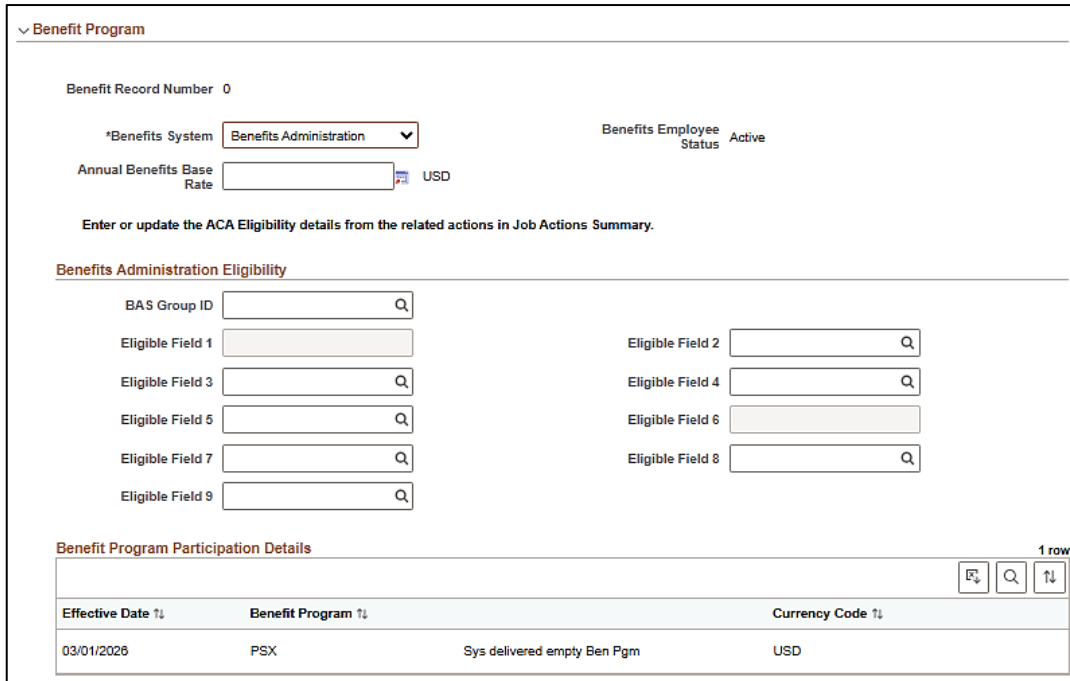
Step	Action
	The Job Information section displays. Job Information Supervisor SOC CD Job Code ORPHBO ORP Retiree Supervisor Level E Employee Reports To View Current Incumbents Regular/Temporary Regular Employee Class Regular Shift Not Applicable Classified Ind Classified Supervisor Name Supervisor Posn Job Entry Date 02/01/2026 Reports To Manager Full/Part Part-Time *Officer Code None Shift Rate Shift Factor Standard Hours Standard Hours 20.00 FTE 0.500000 Encumbrance Override Work Period Weekly Adds to FTE Actual Count? > USA
54.	Click the Employee Class dropdown button and select the applicable Employee Class. In this example “ORPRetiree” has been selected. Employee Class ORPRetiree
55.	Click the Salary and Compensation tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

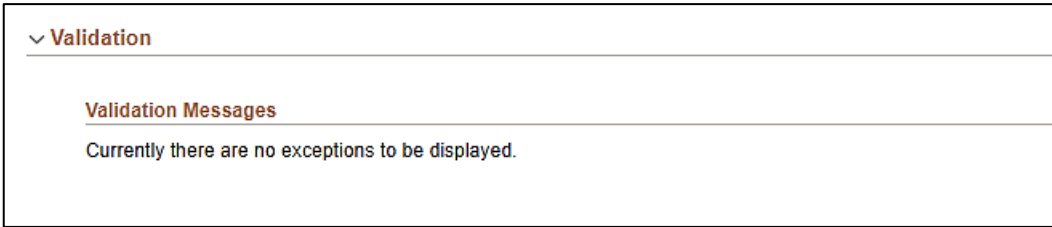
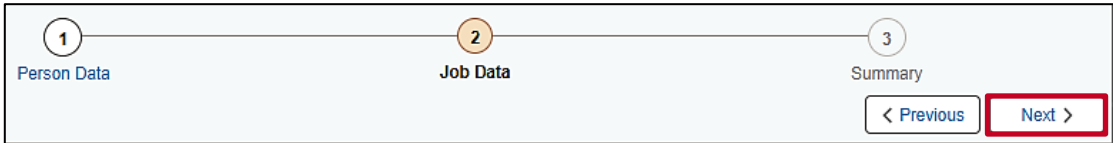
Step	Action
	The Salary and Compensation section displays. 
56.	Click the Frequency Look up icon and select “M” (Monthly). 
57.	Click the Default Pay Components button. 
58.	Click the Calculate Compensation button. 

Step	Action
59.	Click the Payroll tab. 
	The Payroll section displays. 
60.	Click the Pay Group Look up icon and select “MNP” (Non-Payroll). 
61.	Enter the applicable Tax Location Code in the Tax Location Code field. 



Step	Action																												
	Other fields in the Payroll for North America section auto-populate based upon the selected Pay Group. Do not change. Payroll for North America <table><tr><td>Pay Group</td><td> MNP </td><td> Q </td><td></td></tr><tr><td></td><td>Non-Payroll</td><td></td><td></td></tr><tr><td>Employee Type</td><td> S </td><td> Q </td><td>Holiday Schedule NOHOL </td></tr><tr><td></td><td>Salaried</td><td></td><td>LOCALITY</td></tr><tr><td>Tax Location Code</td><td> 087 </td><td> Q </td><td></td></tr><tr><td></td><td>Henrico</td><td></td><td></td></tr><tr><td>GL Pay Type</td><td> </td><td></td><td>FICA Status Exempt </td></tr></table>	Pay Group	MNP	Q			Non-Payroll			Employee Type	S	Q	Holiday Schedule NOHOL		Salaried		LOCALITY	Tax Location Code	087	Q			Henrico			GL Pay Type			FICA Status Exempt
Pay Group	MNP	Q																											
	Non-Payroll																												
Employee Type	S	Q	Holiday Schedule NOHOL																										
	Salaried		LOCALITY																										
Tax Location Code	087	Q																											
	Henrico																												
GL Pay Type			FICA Status Exempt																										
62.	Click the Benefit Program tab.  Work Location  Job Information  Salary and Compensation  Payroll  Employment Data  Benefit Program  COV Specific  Validation																												

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.

Step	Action
64.	Click the Validation tab. 
The Validation section displays. 	
65.	Click the Next button. 

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

The **Validation Messages** section displays.

Validation Messages

☐ Proceed with warning

 Validation Successful with warnings

4 rows

Message Severity	Message Text
1 Warning	Warning -- date out of range. (15,9)
2 Warning	Warning -- Head count of 620 exceeds maximum head count of 1 for position. (1000,156)
3 Warning	Warning -- Compensation Frequency has been updated. (1010,264)
4 Warning	Warning -- Compensation Rate is zero. (1000,31)

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

Next >

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.

Validation Messages

 Validation failed

3 rows

Message Severity	Message Text
1 Warning	Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.
2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)
3 Error	Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)

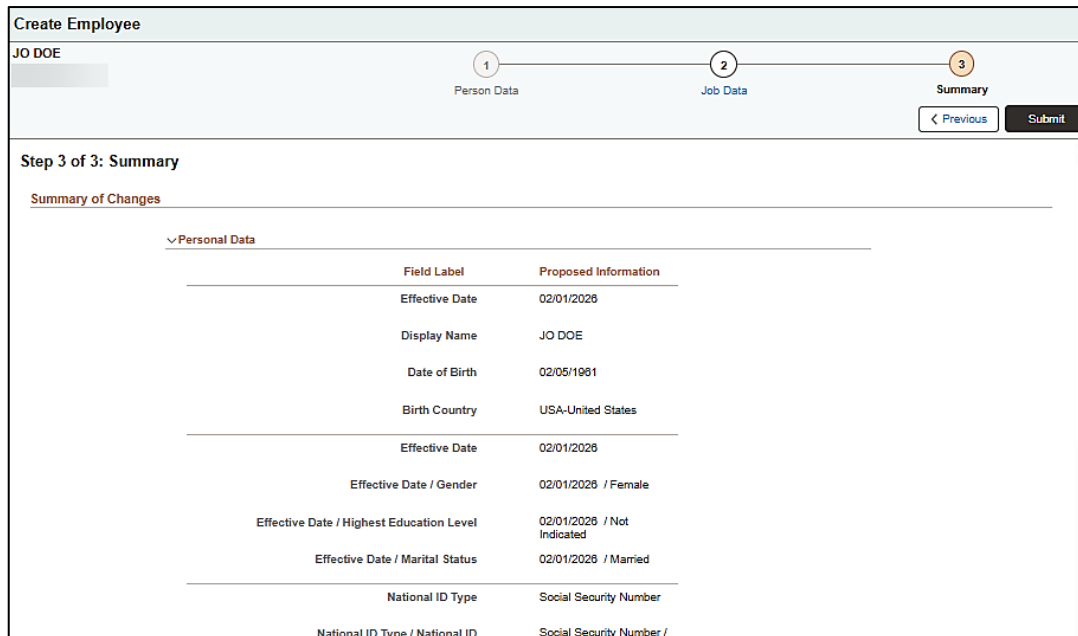
Validation Messages

☒ Proceed with warning

 Validation Successful with warnings

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

The **Create Employee Step 3 of 3: Summary** page displays.



Create Employee

JO DOE

1 Person Data 2 Job Data 3 **Summary**

< Previous Submit

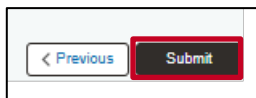
Step 3 of 3: Summary

Summary of Changes

Personal Data

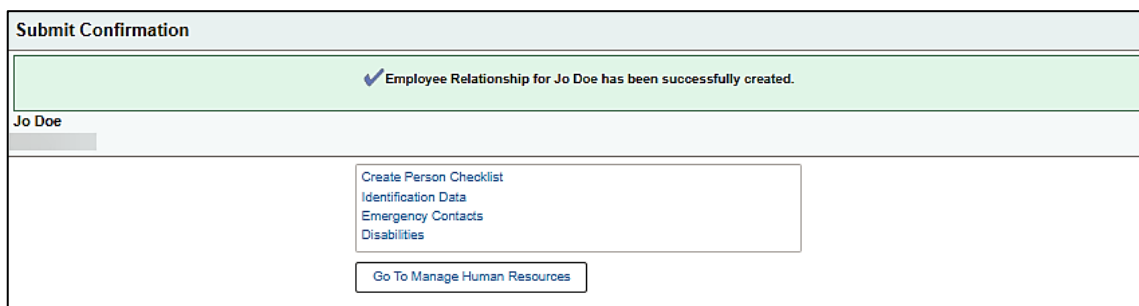
Field Label	Proposed Information
Effective Date	02/01/2026
Display Name	JO DOE
Date of Birth	02/05/1981
Birth Country	USA-United States
Effective Date	02/01/2026
Effective Date / Gender	02/01/2026 / Female
Effective Date / Highest Education Level	02/01/2026 / Not Indicated
Effective Date / Marital Status	02/01/2026 / Married
National ID Type	Social Security Number
National ID Type / National ID	Social Security Number /

67. Review the **Summary of Changes** section, and then click the **Submit** button.



< Previous Submit

The **Submit Confirmation** page displays.



Submit Confirmation

✓ Employee Relationship for Jo Doe has been successfully created.

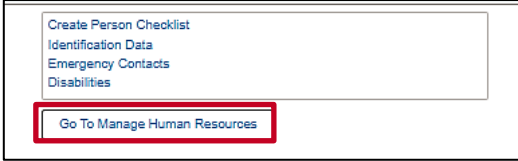
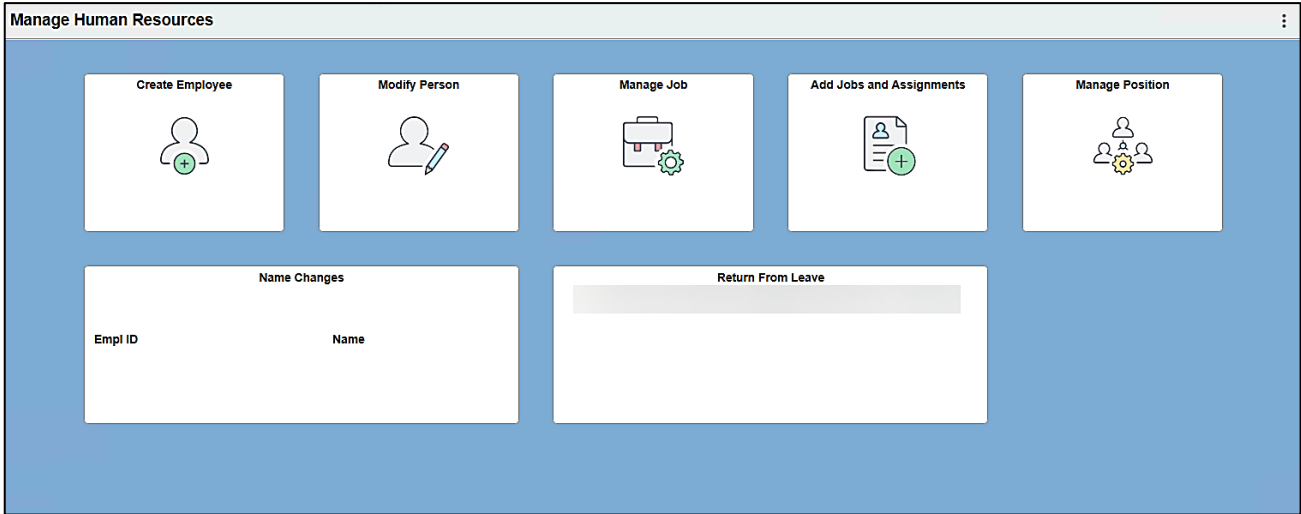
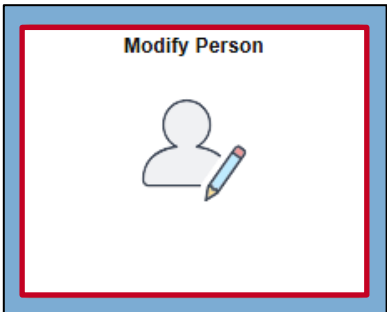
Jo Doe

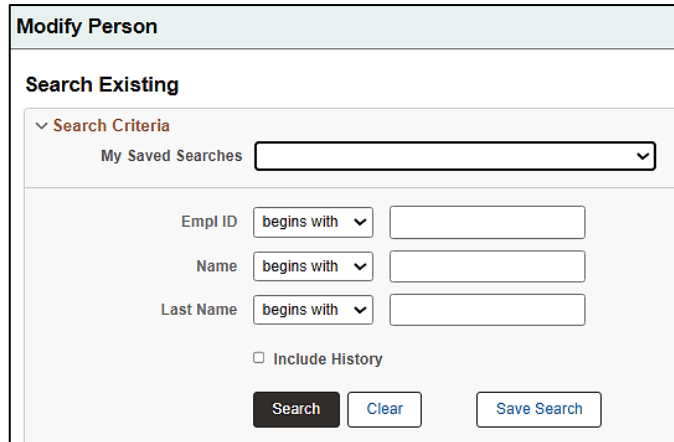
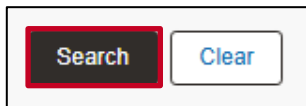
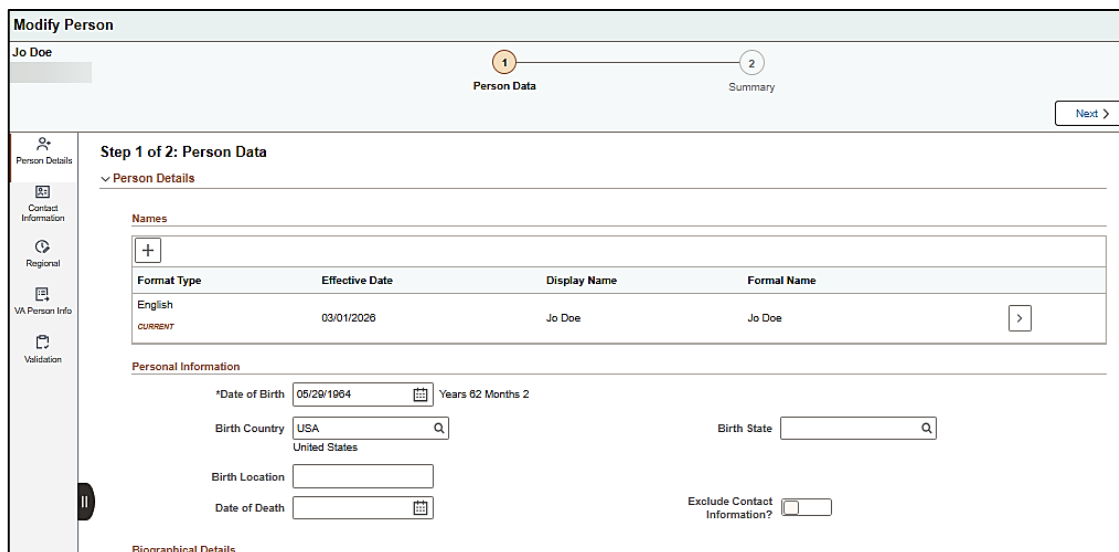
Create Person Checklist
Identification Data
Emergency Contacts
Disabilities

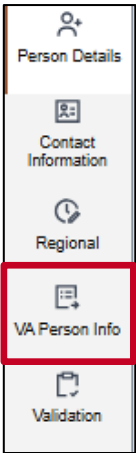
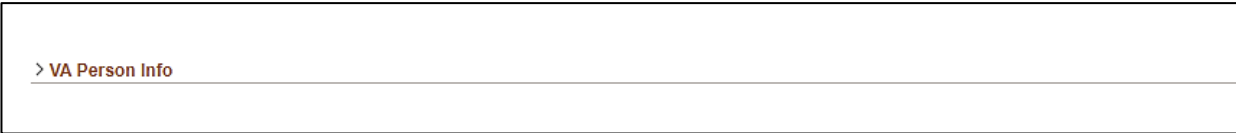
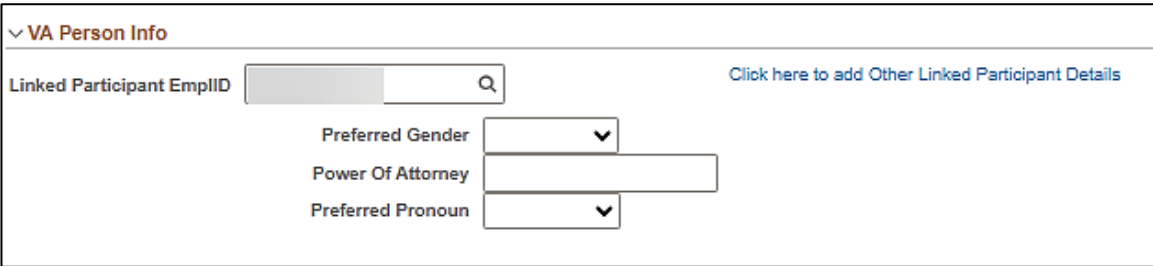
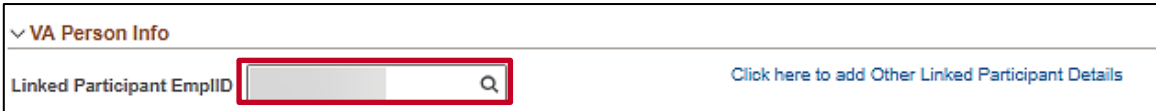
Go To Manage Human Resources

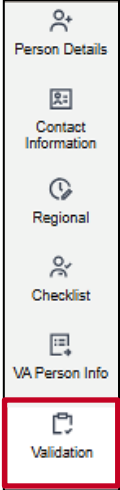
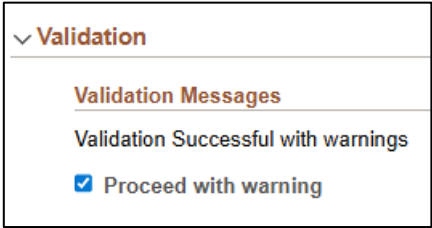


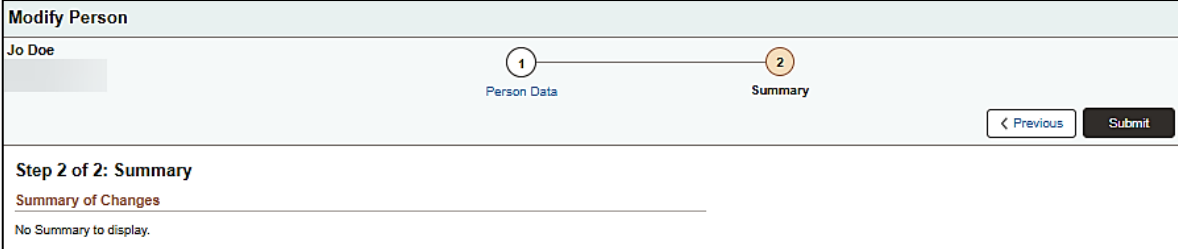
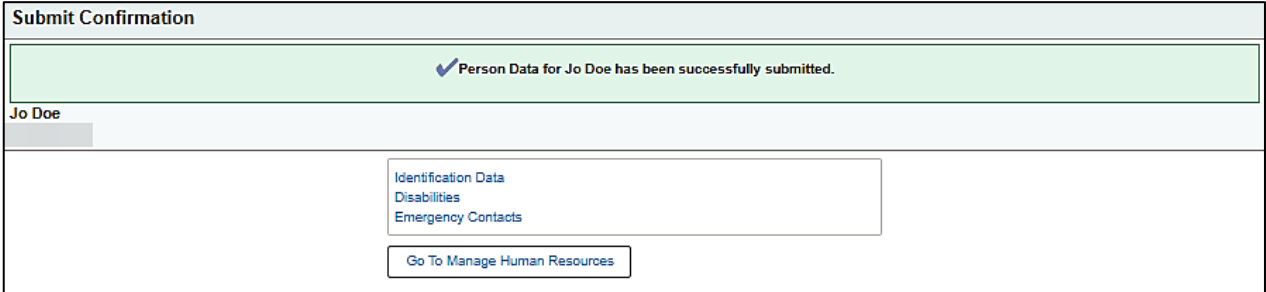
As a reminder, Cardinal has auto assigned the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for the next steps.

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

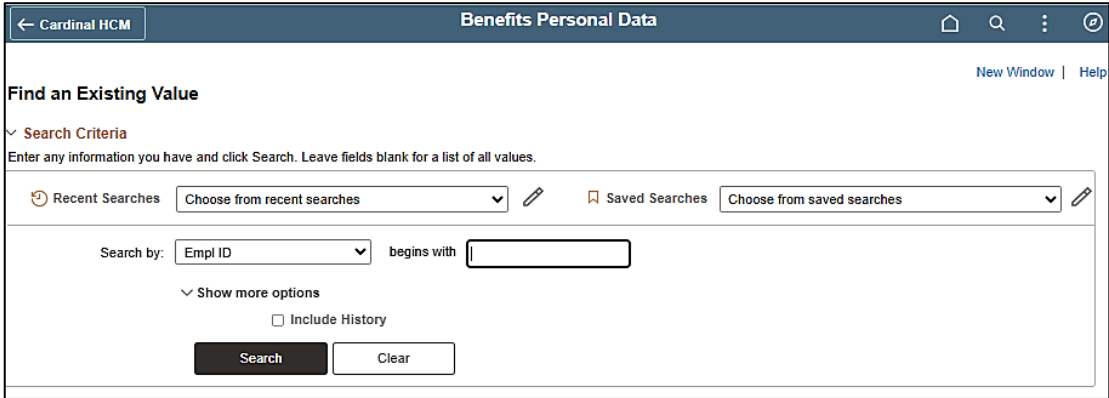
Step	Action
72.	Click the VA Person Info tab. 
The VA Person Info section displays. 	
73.	Click the VA Person Info link to expand the section. 
The VA Person Info section expands to show all the fields in this section. 	
74.	Validate that the retiree's Employee ID is populated in the Linked Participant EmplID field. If not, enter the retiree's Employee ID. 

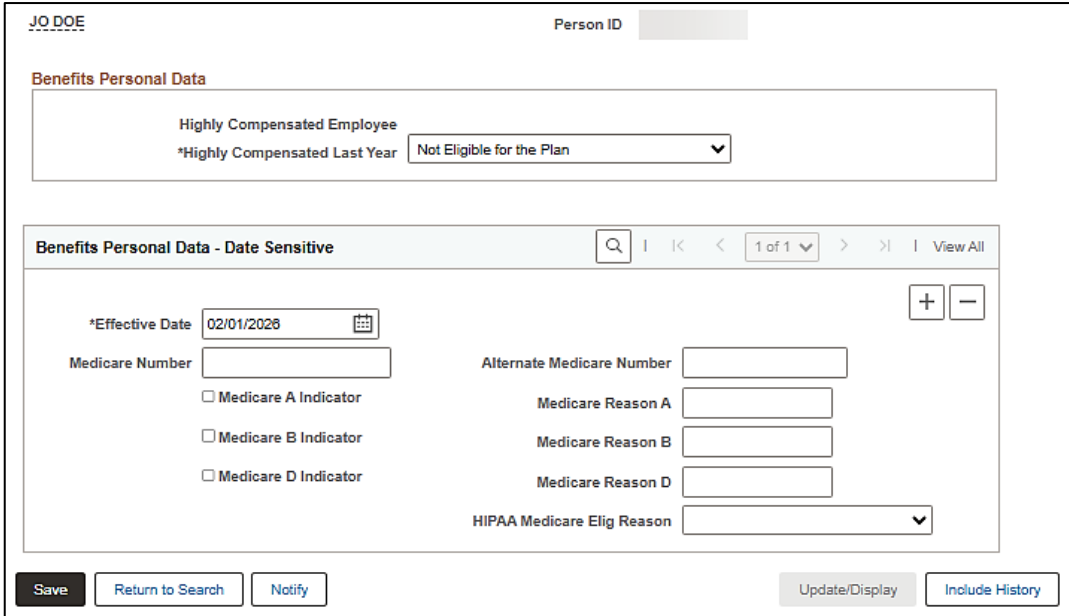
Step	Action
75.	Click the Validation tab. 
The Validation section displays. 	
	Validation messages may appear that include warnings and errors. If a Validation warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving.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

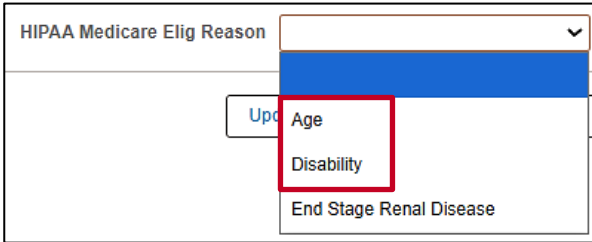
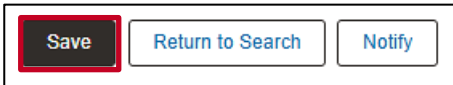
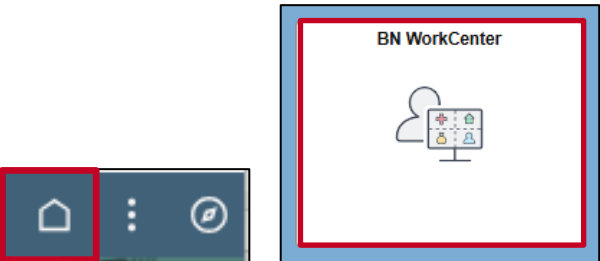
Step	Action
	The Modify Person Step 2 of 2: Summary page displays the Summary of Changes. 
77.	Click the Submit button. 
	The Submit Confirmation page displays. 

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.

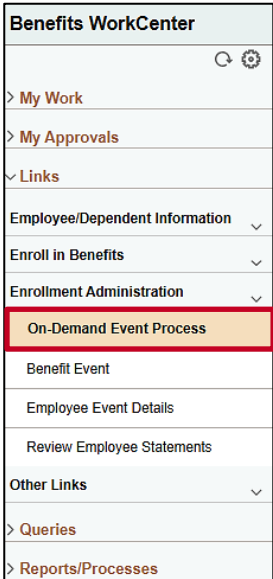
Step	Action
1.	Navigate to the Benefits Personal Data page using the following path: NavBar > Menu > Benefits > Employee/Dependent Information > Benefits Personal Data The Benefits Personal Data Find an Existing Value Search page displays. 
	For more information pertaining to the Cardinal HCM Search 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. 

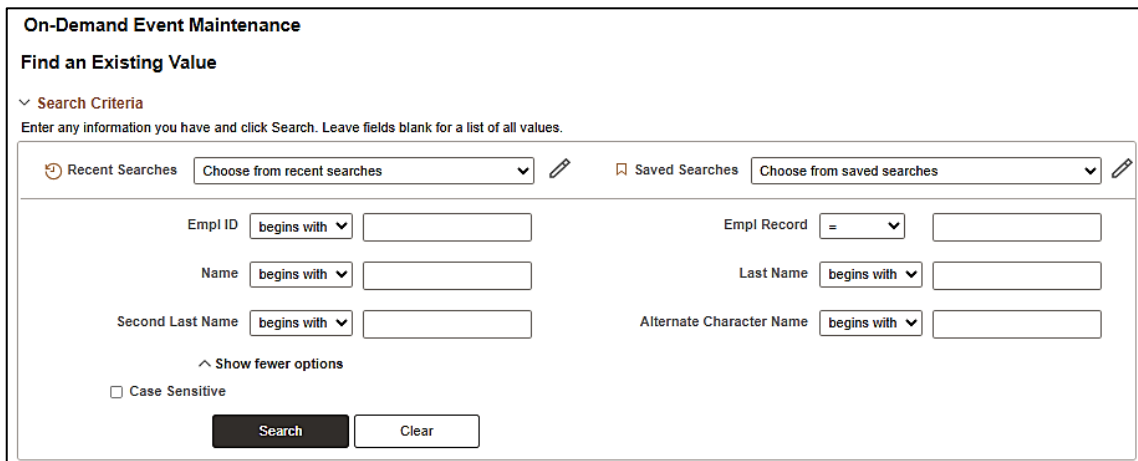
Step	Action
	For End Stage Renal Disease, the Medicare A, B, and/or D Indicator checkbox options will not be checked. OHB is establishing the record for End Stage Renal Disease (ESRD).
6.	Click the HIPAA Medicare Elig Reason dropdown button and select either “Age” or “Disability” as the applicable HIPPA 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.

Step	Action
1.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > On-Demand Event Process 
	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.

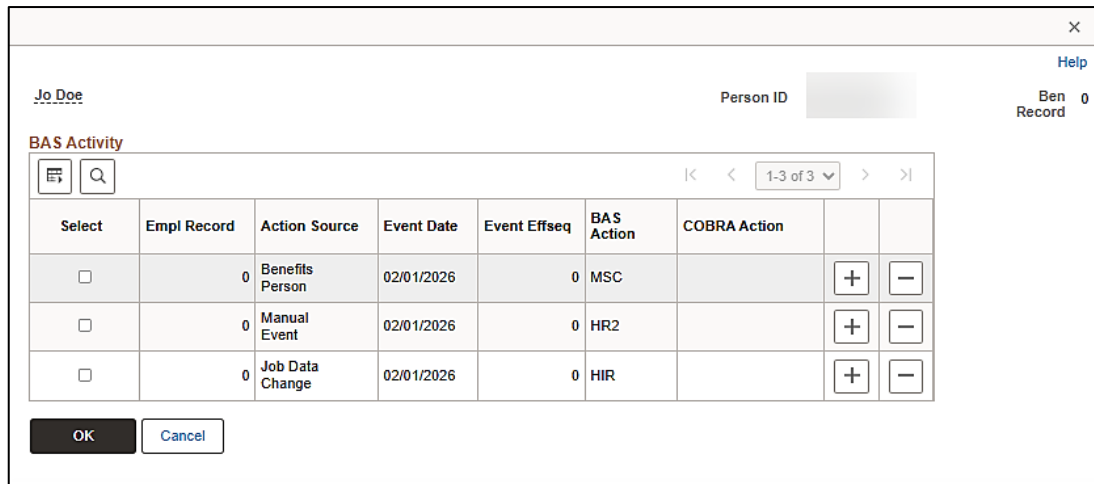




Step	Action
2.	Enter the spouse's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. Empl ID begins with ▾
3.	Click the Search button. Search Clear
The On-Demand Event Process page displays. Jo Doe Person ID Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 3 Show Activities Action Event ID 0 Event Date Status Class Event Status Update Prepare Options Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify	
4.	Click the Show Activities button. Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 3 Show Activities Action

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

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



Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
☐	0	Benefits Person	02/01/2026	0	MSC	
☐	0	Manual Event	02/01/2026	0	HR2	
☐	0	Job Data Change	02/01/2026	0	HIR	



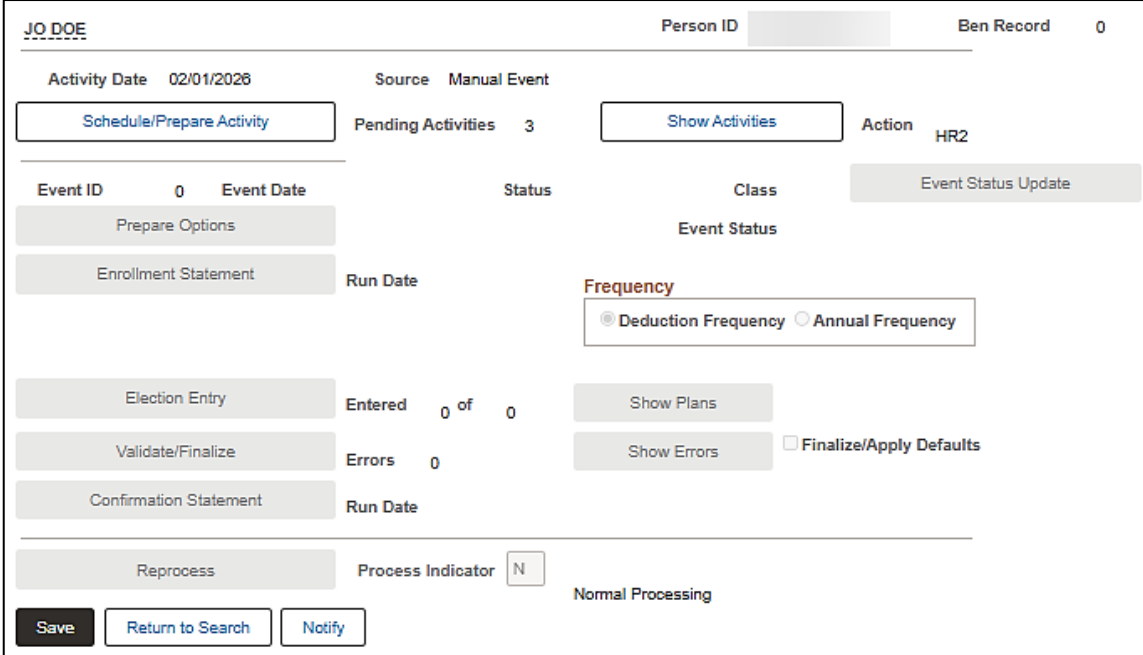
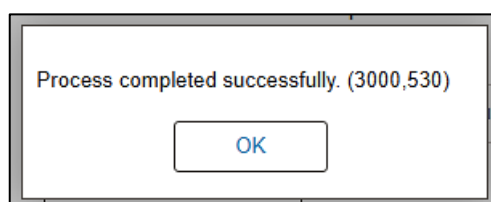
Benefits Personal Data may trigger an “MSC” event. Events should be processed in the following order: “HR2”, “HIR”, and the “MSC” event last.

5. Click the **Select** checkbox option for the “HR2” Benefit Event.

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☐	0	Benefits Person	02/01/2026	0	MSC		+	-
☒	0	Manual Event	02/01/2026	0	HR2		+	-
☐	0	Job Data Change	02/01/2026	0	HIR		+	-

6. Click the **OK** button.



Step	Action
	The On-Demand Event Process page redisplay. 
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. 



Benefits Job Aid

BN361 Employee Set Up for Medicare

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

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

Jo Doe Person ID [redacted] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 2 [Show Activities](#) Action

Event ID 1 Event Date 02/01/2026 Status Prepared Class HR2 [Event Status Update](#)

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency ☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 0 [Show Plans](#)

Validate/Finalize Errors 0 [Show Errors](#) ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

[Reprocess](#) Process Indicator N [Q](#) Normal Processing

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

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

[Show Activities](#)

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

Jo Doe Person ID [redacted] Ben Record 0

BAS Activity

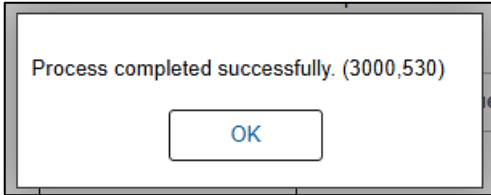
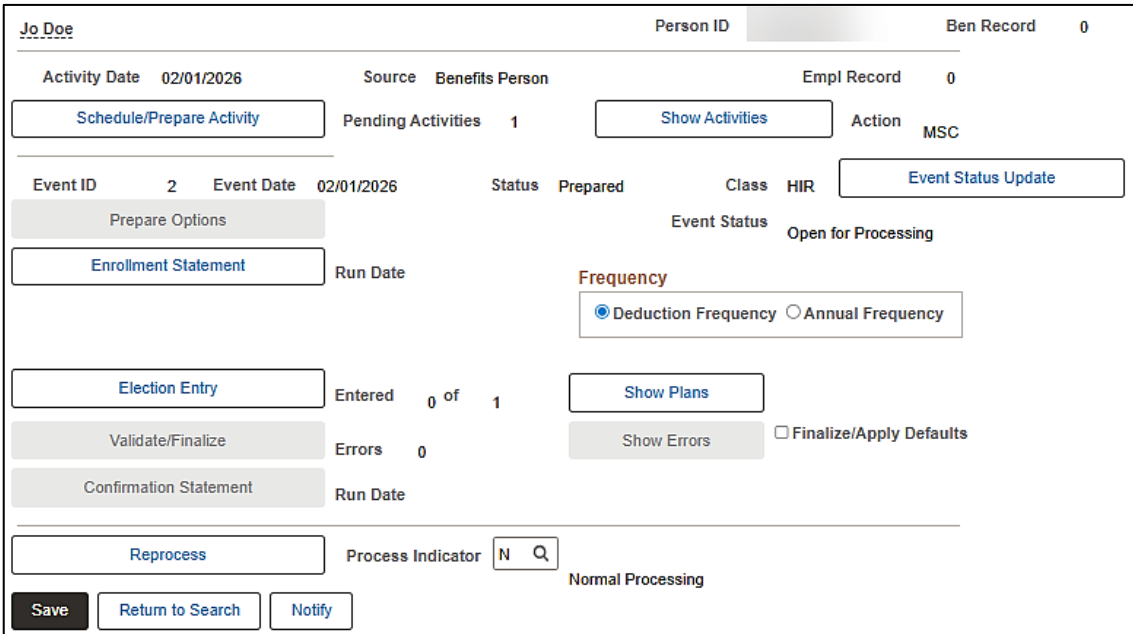
[Help](#)

[Q](#) |< < 1-2 of 2 > >|

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		+	-

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

Step	Action																											
10.	Click the Select checkbox option for the “HIR” Benefit Event. <table><tr><th>Select</th><th>Empl Record</th><th>Action Source</th><th>Event Date</th><th>Event Effseq</th><th>BAS Action</th><th>COBRA Action</th><th></th><th></th></tr><tr><td>☐</td><td>0</td><td>Benefits Person</td><td>02/01/2026</td><td>0</td><td>MSC</td><td></td><td>+</td><td>-</td></tr><tr><td>☒</td><td>0</td><td>Job Data Change</td><td>02/01/2026</td><td>0</td><td>HIR</td><td></td><td>+</td><td>-</td></tr></table>	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		+	-
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		+	-																				
11.	Click the OK button. OK Cancel																											
The On-Demand Event Process page redisplay. Jo Doe Person ID Ben Record 0 Activity Date 02/01/2026 Source Job Data Change Empl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HIR Event ID 1 Event Date 02/01/2026 Status Prepared Class HR2 Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Q Normal Processing Save Return to Search Notify																												
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. Schedule/Prepare Activity																											

Step	Action
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
13.	Click the OK button to close the message. 
	The On-Demand Event Process page redisplay. 
14.	Click the Election Entry button. 



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

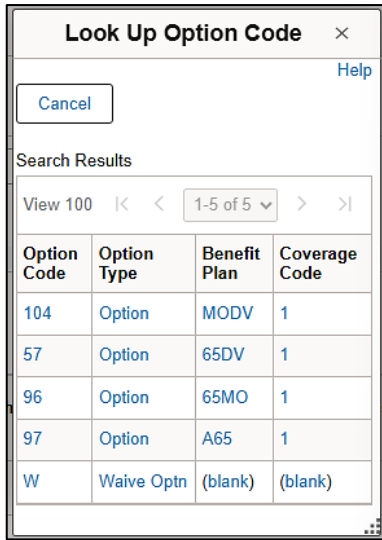
The **BenAdmin Data Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The window displays fields for 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Option Election' section includes a search bar for 'Option Code' and a 'Health Provider ID' field. Below this is a 'Dependents/Beneficiaries' section with a table for adding dependents. The table has columns for ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. At the bottom of the window are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'.

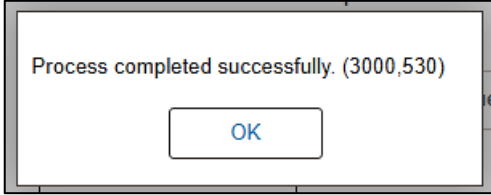
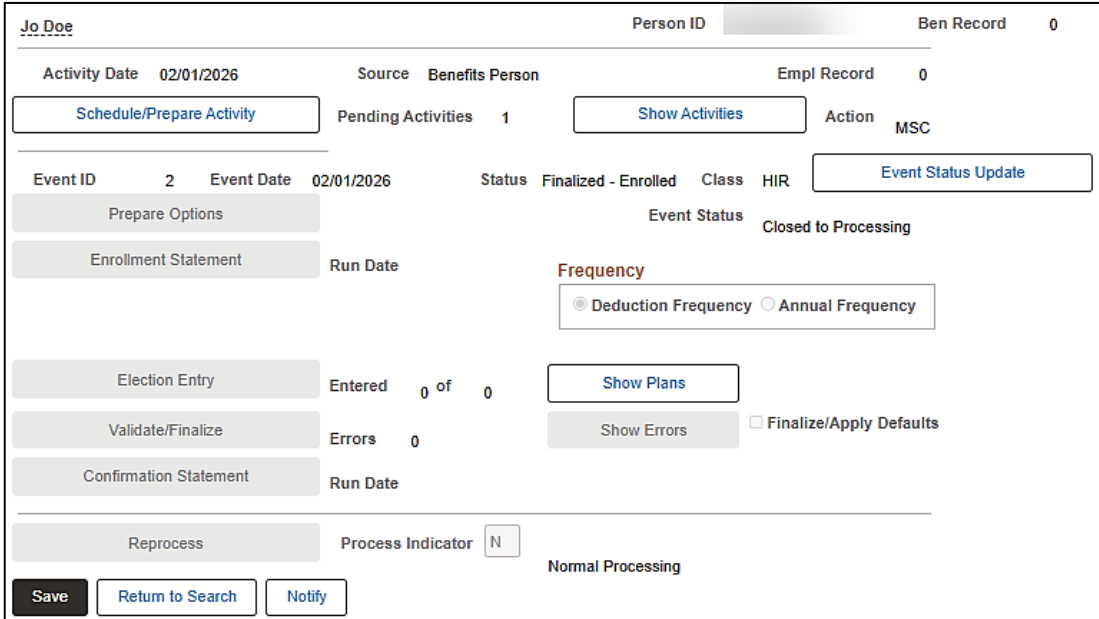
ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
				☐		☐

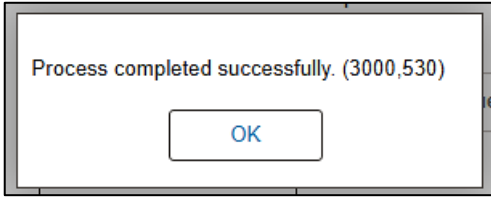
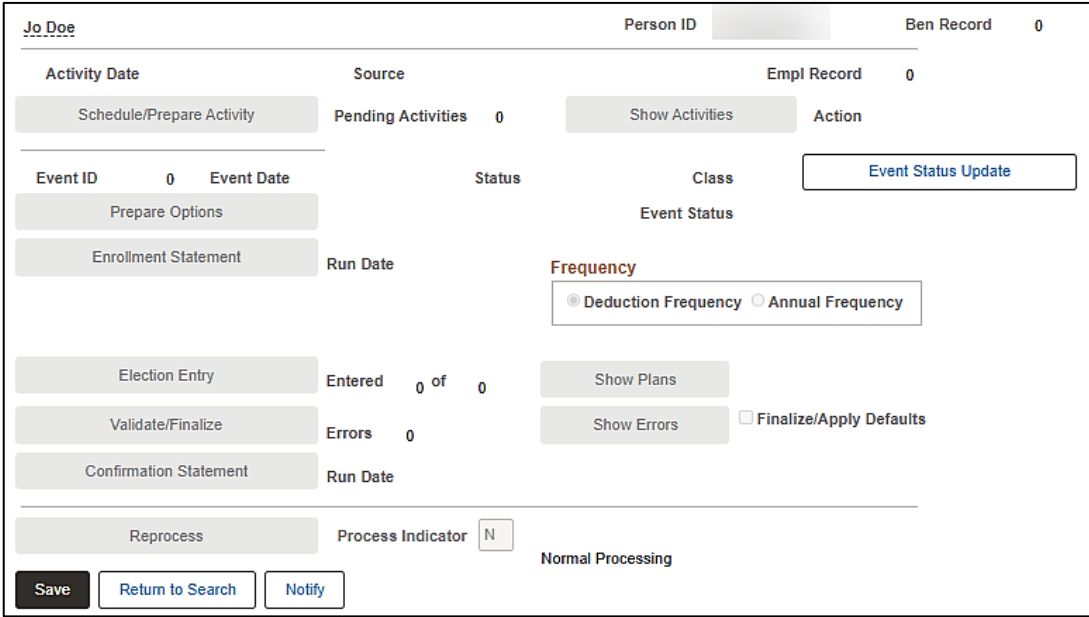
15. Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section.

This close-up shows the 'Plan Type 10 : Medical' section. It features a search bar labeled 'Option Code' with a magnifying glass icon to its right, which is highlighted by a red rectangle.

Step	Action																								
	The Look Up Option Code page displays in a pop-up window. 																								
	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. <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>	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)
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 redisplay with the selected Option Code displayed. Plan Type 10 : Medical Option Code 57 Q Advan65 + RX + Den&Vision (65DV) (Single) Health Provider ID ☐ Previously Seen
17.	Click the OK button. OK Cancel Apply
	The On-Demand Event Process page redisplay. Jo Doe Person ID Ben Record 0 Activity Date 02/01/2026 Source Benefits Person Empl Record 0 Schedule/Prepare Activity Pending Activities 1 Show Activities Action MSC Event ID 2 Event Date 02/01/2026 Status Entered Class HIR Event Status Update Prepare Options Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 1 of 1 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Q Normal Processing Save Return to Search Notify
18.	Click the Validate/Finalize button. Validate/Finalize

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 redisplay. 
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. 
21.	Click the OK button to close the message. 
	The On-Demand Event Process page redisplay. 
	The spouse has been hired, linked to the retiree, and enrolled in Medicare.