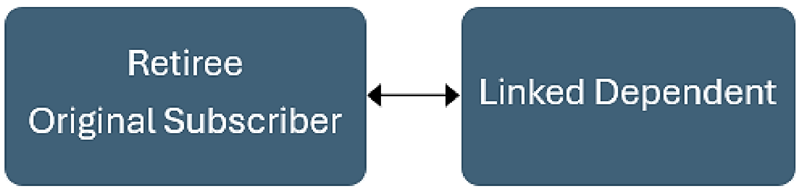
Linking Dependents and Retirees Overview

This Job Aid provides guidance on the process to Link Dependents to Retirees, LTD members, and LODA participants.

Note: All further references to “Retirees” will include Retirees, LTD members, and LODA participants.

In Cardinal, Dependents of Retirees require their own Employee ID (EmplID) when either the Retiree or Dependent enrolls in a Medicare coordinating plan, as all Medicare-eligible enrollments are for single coverage. This establishes the Dependent as a "Linked Dependent".



A separate Employee ID for a Dependent is needed when:

- A Retiree is eligible for Medicare, but their Dependent is under 65 and needs a non-Medicare coordinating plan
- A Dependent is eligible for Medicare, but the Retiree is under 65 and enrolling in a non-Medicare coordinating plan
- Both the Retiree and Dependent are Medicare eligible and enrolling in Medicare

Why linking is crucial:

Once a Dependent has a separate Employee ID, a link is established on the personal information pages of both the Retiree’s and the Linked Dependent’s record. This link serves three important purposes:

- **Coverage Tracking**: Allows administrators to identify all linked records for the original subscriber
- **Eligibility Management**: Ensures that if the Retiree loses eligibility, the Dependent's coverage can also be identified and terminated
- **Age-Based Removal**: Facilitates the automatic removal of Linked Dependents at the end of the year in which they turn 26

To link the two records together, the HR Administrator must populate the **Linked Participant EmplID** field as well as complete the **Other Linked Participant EmplID** section on the **VA Person Info** tab on the **Modify a Person** page for both the original subscriber, and then repeat for the Linked Dependent(s). Users must perform the steps outlined in this Job Aid for the original subscriber, and then repeat for the Linked Dependent(s) so that all parties (original subscribers and Linked Dependents) have both the Linked Participant EmplID and the Other Linked Participant Data populated.

- The Retiree’s record (original subscriber) is populated with the Linked Dependent’s EmplID
- The Linked Dependent’s record is populated with the Retiree’s (original subscriber) EmplID

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.

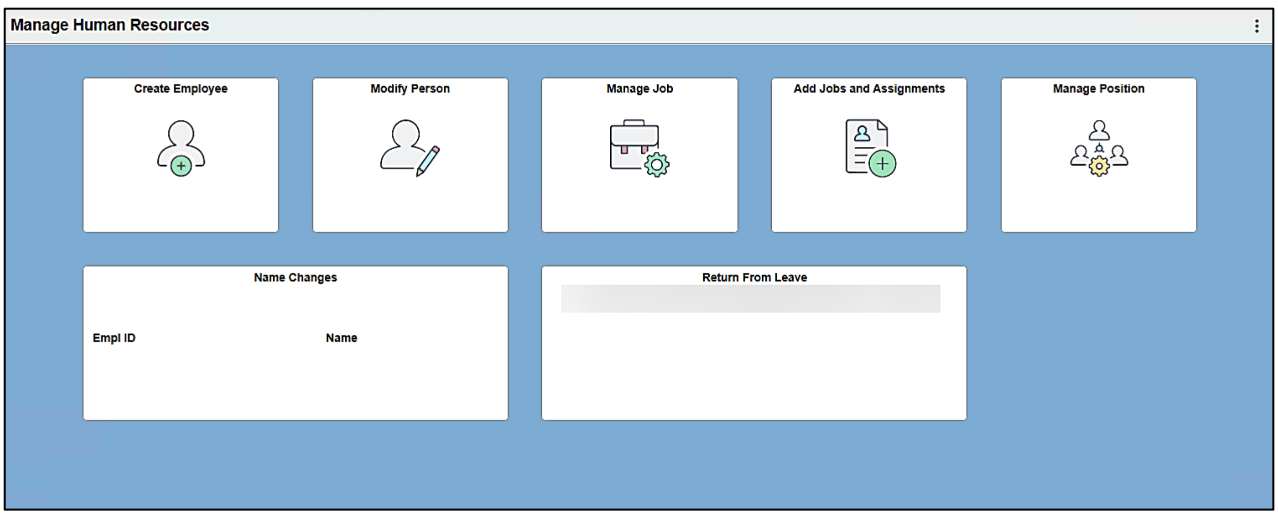
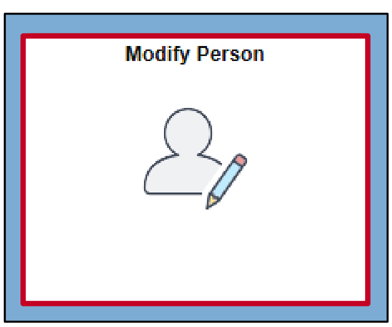
Table of Contents

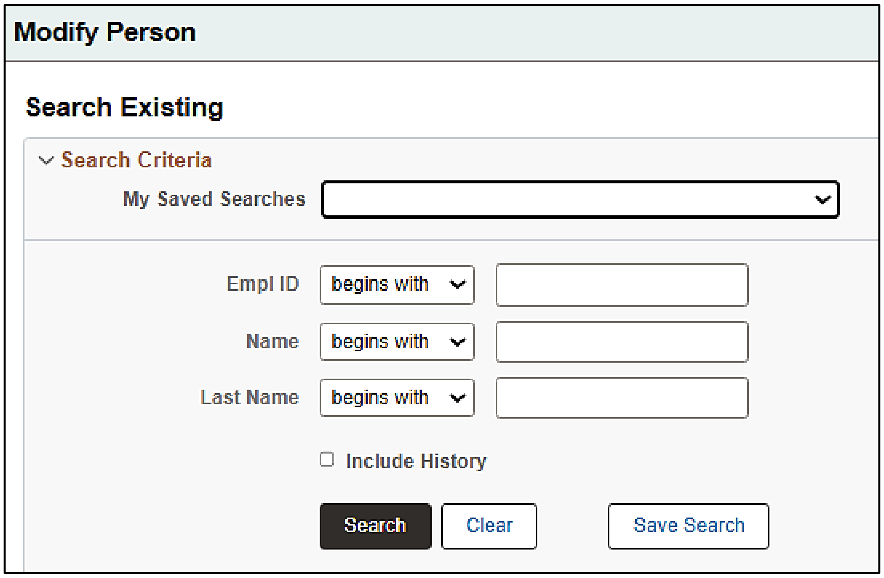
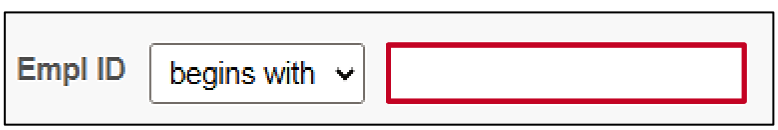
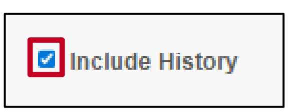
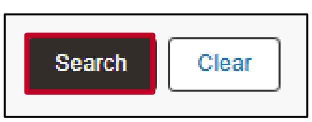
Revision History 3
Linking Dependents and Retirees 4

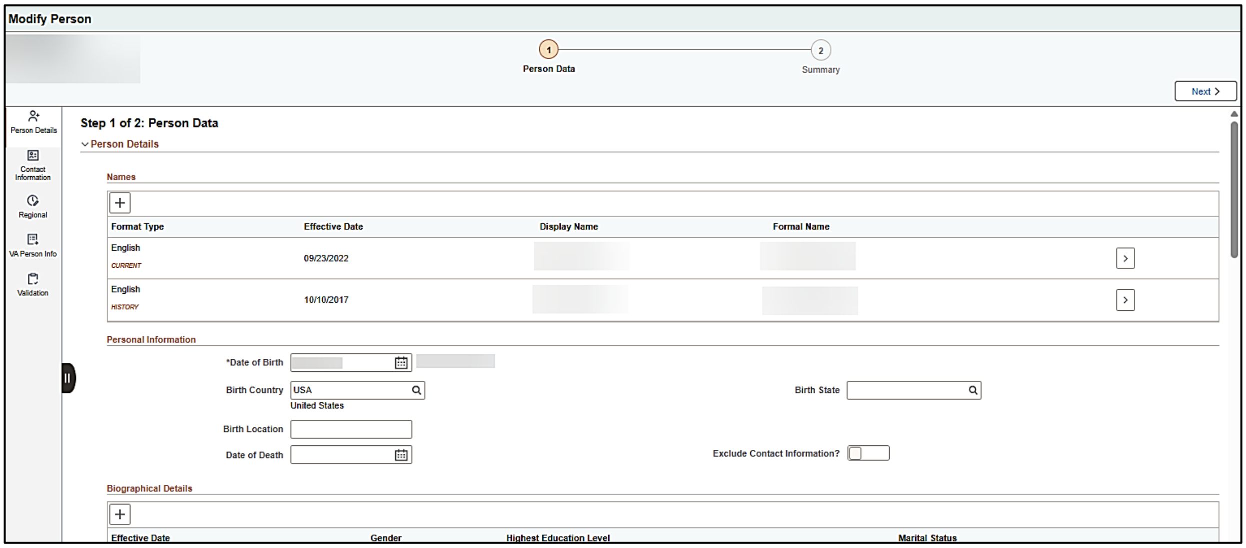
Revision History

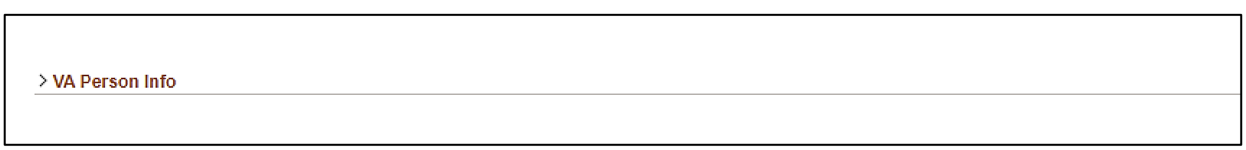
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/13/2026	Baseline.

Linking Dependents and Retirees

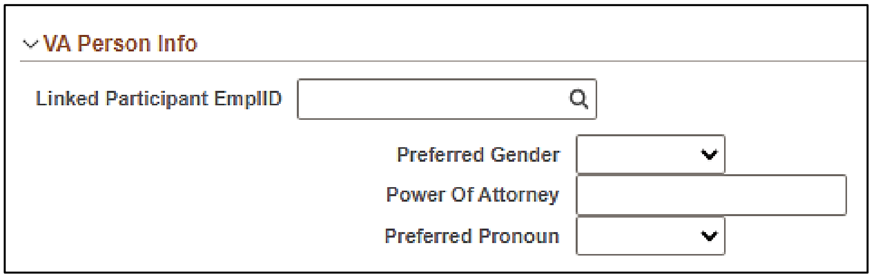
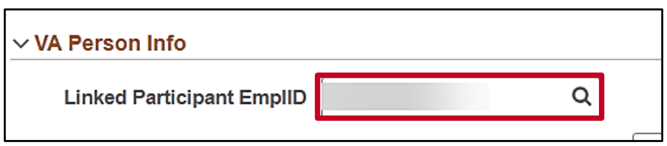
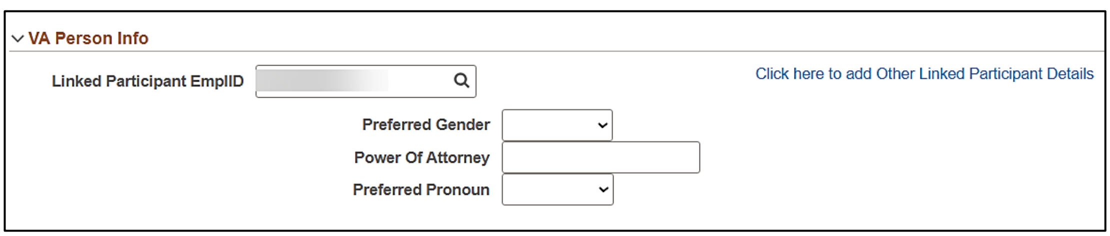
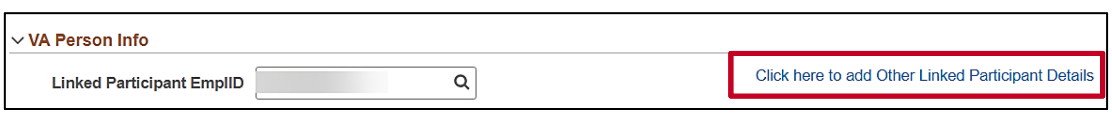
Step	Action
1.	Navigate to the **Modify Person** page by clicking the **Manage Human Resources** tile on the **Cardinal HCM Homepage**. 
	The **Manage Human Resources** page displays. 
2.	Click the **Modify Person** tile. 

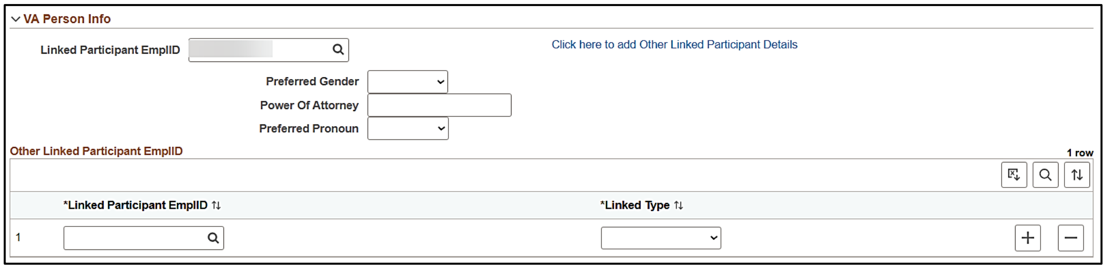
Step	Action
The **Modify Person Search Existing** page displays. 	
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
3.	Enter the Retiree's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable 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. 
4.	Select the **Include History** checkbox option. 
5.	Click the **Search** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Modify Person page displays for the Retiree, Step 1 of 2: Person Data, with the Person Details tab displayed by default.

</td></tr>
<tr><td>6.</td><td>Click the VA Person Info tab.

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

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

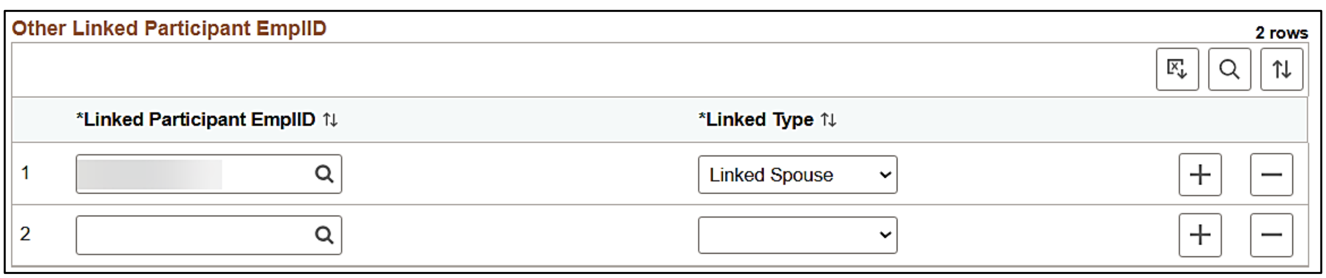
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Click the VA Person Info link to expand the section.

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

</td></tr>
<tr><td>8.</td><td>Enter the Employee ID of the Dependent to be linked to the Retiree in the Linked Participant EmplID field and tab out of the field.

</td></tr>
<tr><td colspan="2">The Retiree's record is populated with the Linked Dependent's EmplID and the Click here to add Other Linked Participant Details link displays.

</td></tr>
<tr><td>9.</td><td>Click the Click here to add Other Linked Participants Details link.

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

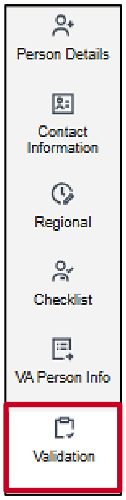
Step	Action
	The **VA Person Info** section redisplays with the **Other Linked Participant EmplID** section available. 
10.	Enter the Employee ID of the Dependent to be linked in the **Linked Participant EmplID** field. 
11.	Click the **Linked Type** dropdown button and select “Linked Child” or “Linked Spouse” as applicable. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>In some cases, it will be necessary to link multiple Dependents to the same Retiree.

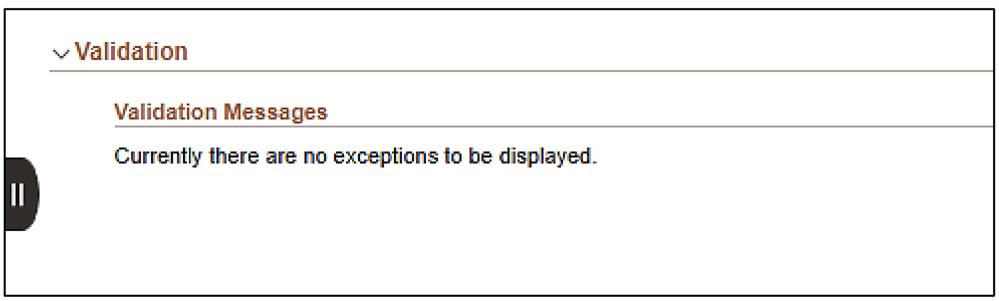
Here are some scenarios where multiple separate Employee IDs are required for Dependents:
Retiree and Spouse on Medicare, Child on Non-Medicare coordinating Plan: The spouse and the child will both have the Retiree's Employee ID recorded in their Linked Participant ID fields.
Retiree on Medicare, Spouse on Employee + Child Non-Medicare coordinating Plan, Spouse Becomes Ineligible: If the spouse either turns 65 and enrolls in Medicare or becomes ineligible due to death or divorce, a new Employee ID is needed for the child. This new child record will then be linked to the Retiree's record.
Retiree on Medicare, Linked Child Ages Out, Younger Child Needs Coverage: If a Linked Child ages out of coverage eligibility, a new Employee ID must be created for a younger child to continue coverage, and this record must be linked to the Retiree's record.</td></tr>
<tr><td>12.</td><td>If more than one Dependent needs to be linked, click the Add a New Row (+) button to add an additional Dependent.

</td></tr>
<tr><td colspan="2">The Other Linked Participant EmplID section displays with the additional row.

</td></tr>
<tr><td>13.</td><td>Repeat Steps 9 – 12 as needed for each Dependent to be linked to the Retiree.</td></tr>
</table>

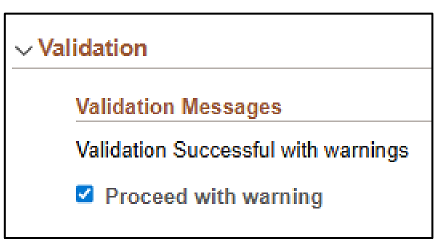
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14.</td><td>Click the Validation tab once all required updates are made.



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

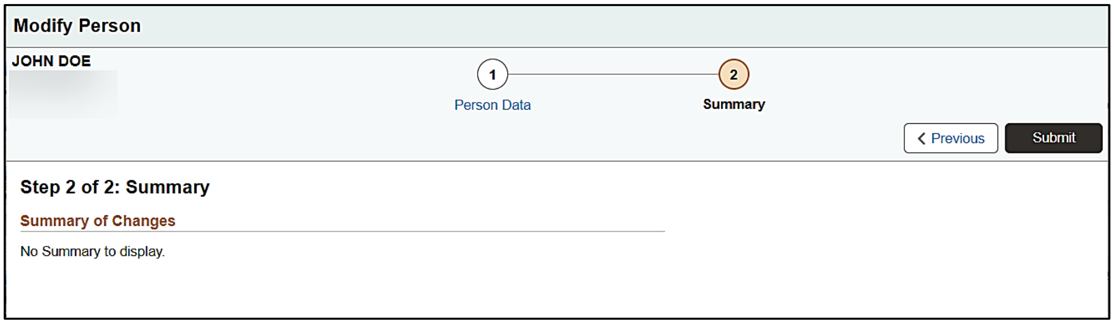


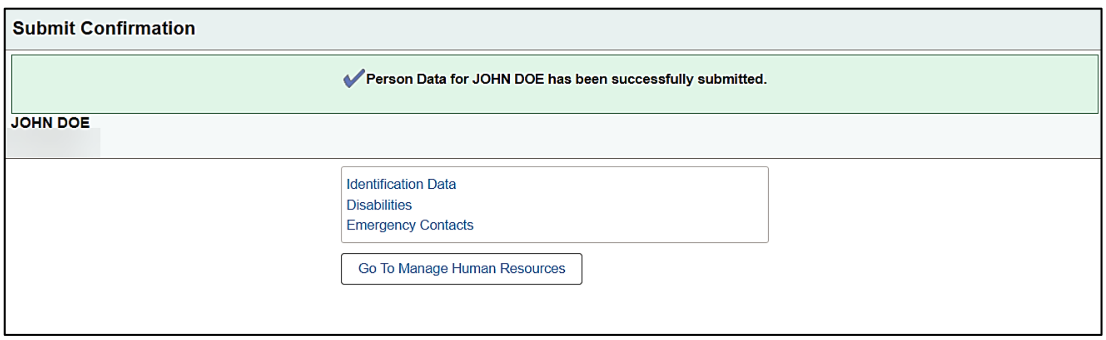
</td></tr>
<tr><td>ℹ</td><td>Validation messages may appear that include warnings and errors. If a Validation warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving.



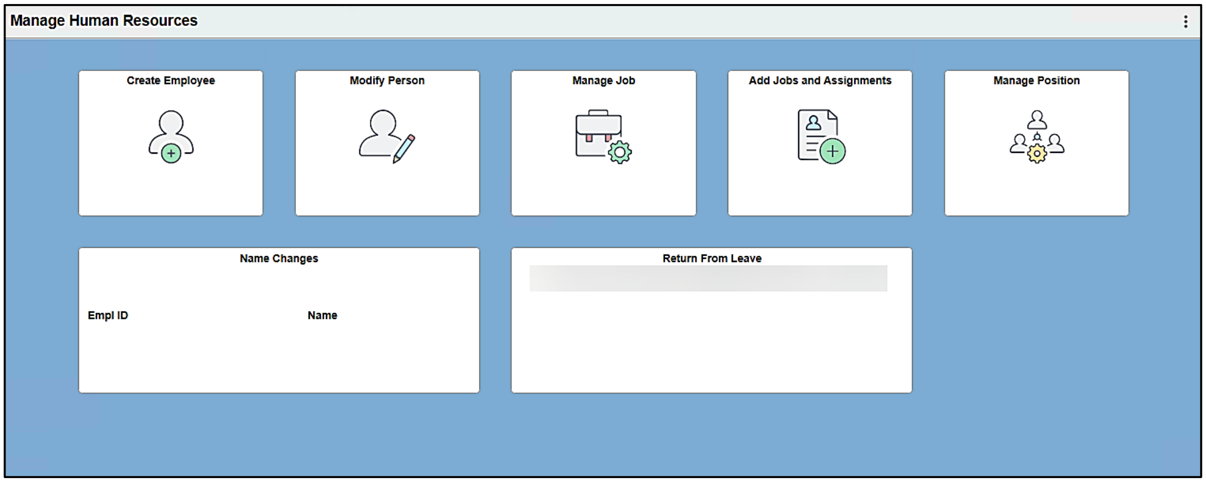
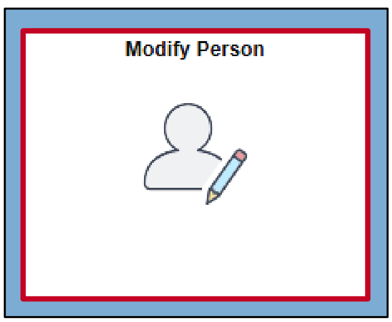
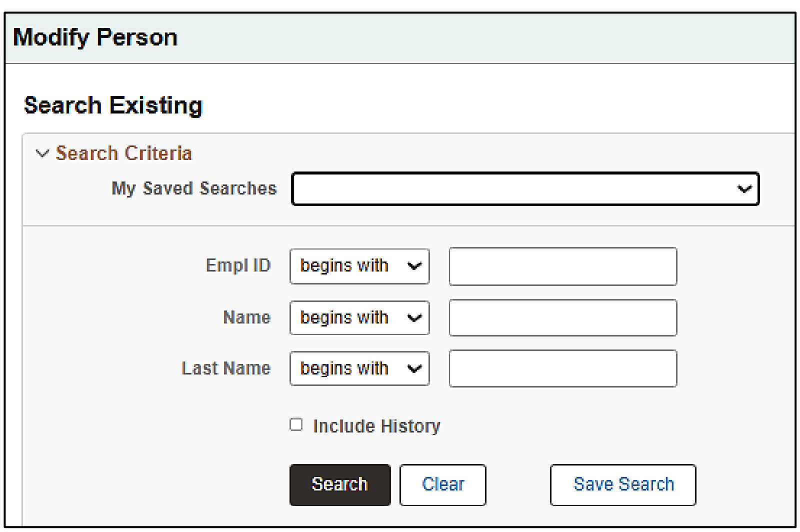
</td></tr>
<tr><td>15.</td><td>Click the Next button once all required updates are made.

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

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

</td></tr>
<tr><td>16.</td><td>Click the Submit button.

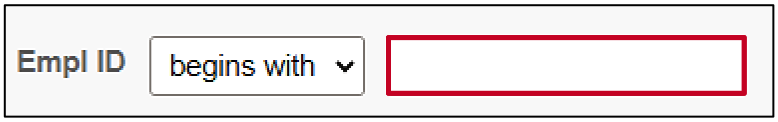
</td></tr>
<tr><td colspan="2">The Submit Confirmation page displays.

</td></tr>
<tr><td></td><td>Now that the Dependent(s) is linked to the Retiree’s record, the Retiree must be linked to the Dependent’s record. The steps below must be completed for each Linked Dependent.</td></tr>
<tr><td>17.</td><td>From the Submit Confirmation page, click the Go To Manage Human Resources link.

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

Step	Action
	The **Manage Human Resources** page displays. 
18.	Click the **Modify Person** tile. 
	The **Modify Person Search Existing** page displays. 

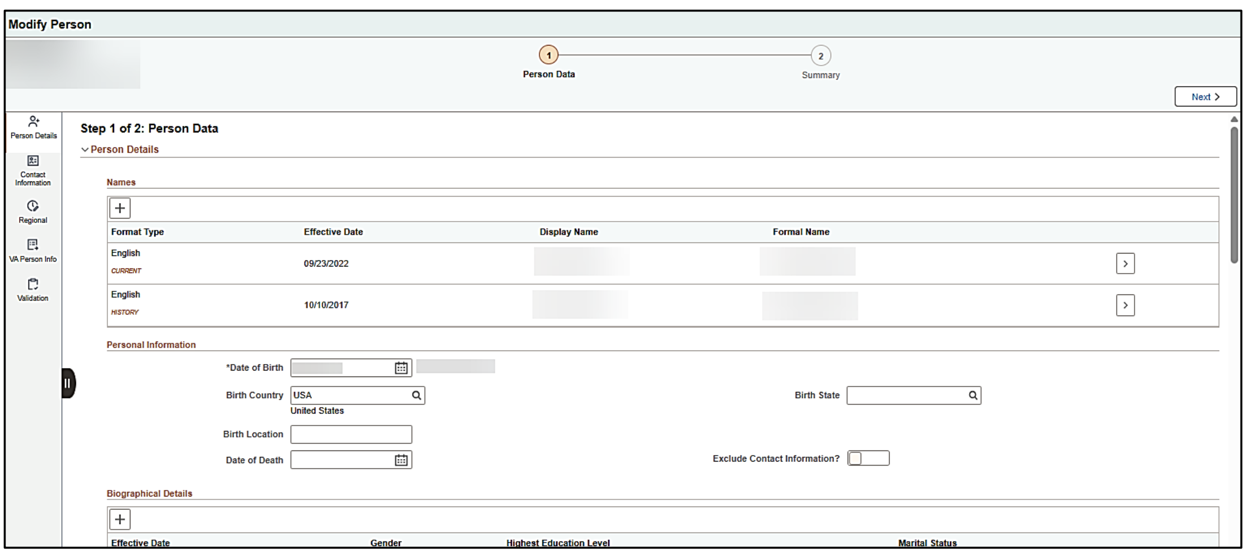
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19.</td><td>Enter the Linked Dependent's Employee ID in the Empl ID field.

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

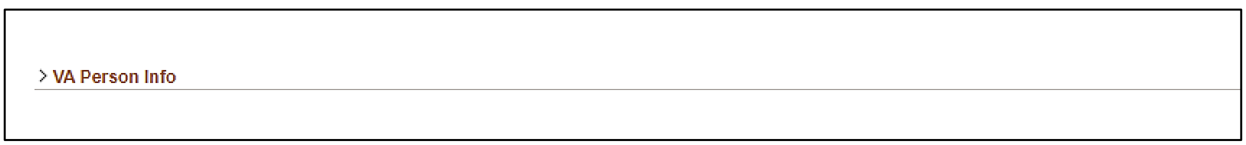
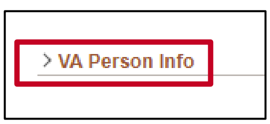
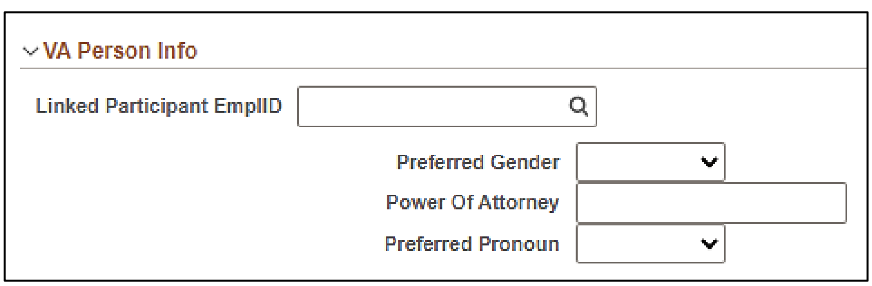
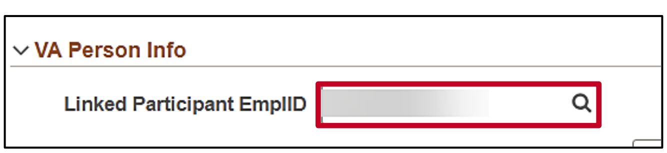

</td></tr>
<tr><td>20.</td><td>Select the Include History checkbox option.

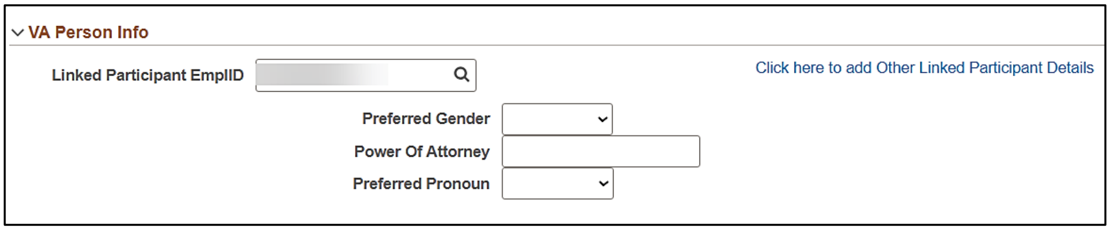
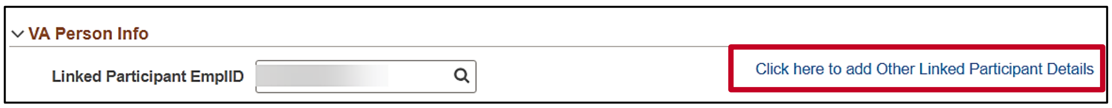
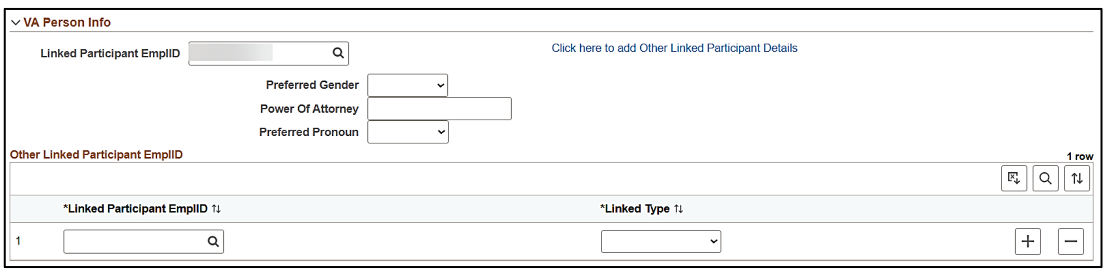

</td></tr>
<tr><td>21.</td><td>Click the Search button.


</td></tr>
<tr><td colspan="2">The Modify Person page displays for the Dependent, Step 1 of 2: Person Data, with the Person Details tab displayed by default.


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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>22.</td><td>Click the VA Person Info tab.

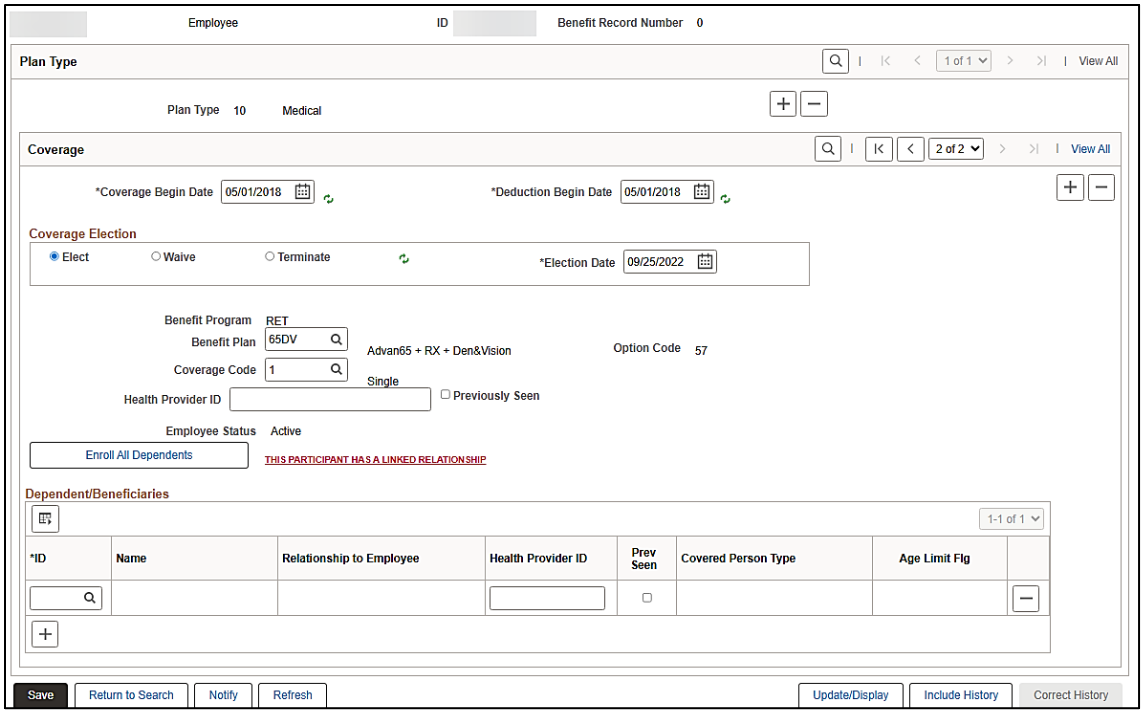
</td></tr>
<tr><td colspan="2">The VA Person Info section displays.

</td></tr>
<tr><td>23.</td><td>Click the VA Person Info link to expand the section.

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

</td></tr>
<tr><td>24.</td><td>Enter the Employee ID of the Retiree to be linked in the Linked Participant EmplID field and tab out of the field.

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

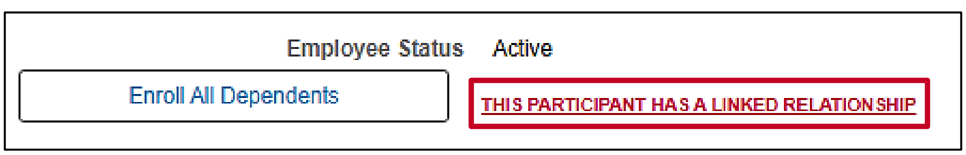
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Dependent’s record is populated with the Linked Retiree’s EmplID and the Click here to add Other Linked Participant Details link displays.

</td></tr>
<tr><td>25.</td><td>Click the Click here to add Other Linked Participants Details link.

</td></tr>
<tr><td colspan="2">VA Person Info section redisplays with the Other Linked Participant EmplID section available.

</td></tr>
<tr><td>26.</td><td>Enter the Employee ID of the Retiree to be linked in the Linked Participant EmplID field.

</td></tr>
<tr><td>27.</td><td>Click the Linked Type dropdown button and select “Original Subscriber”.

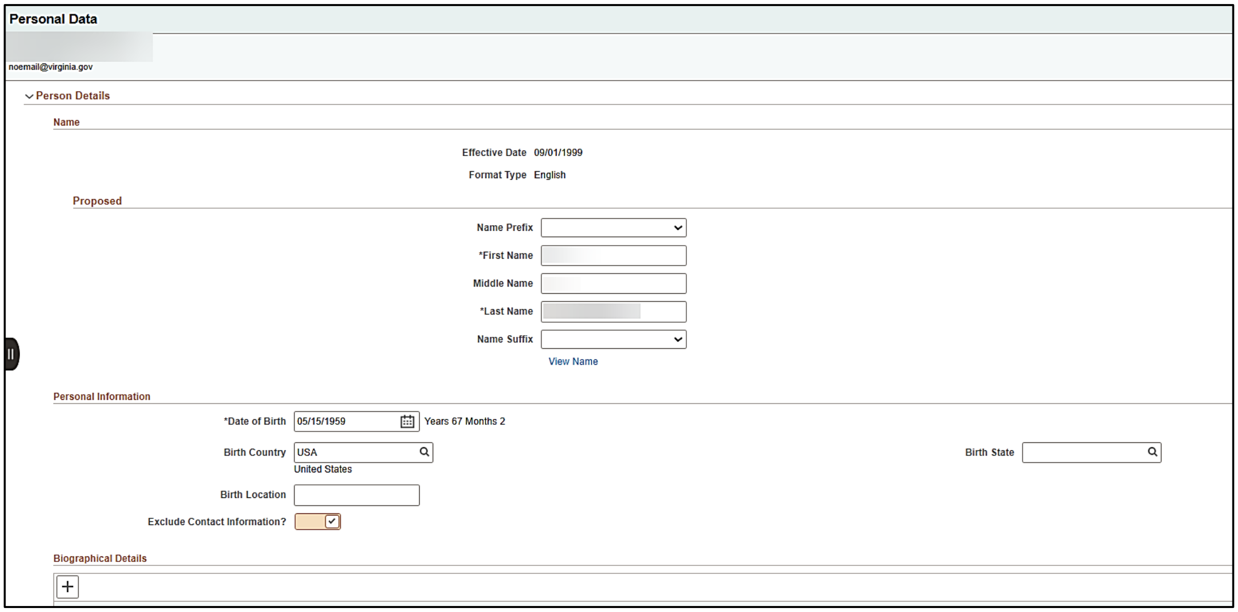
</td></tr>
</table>

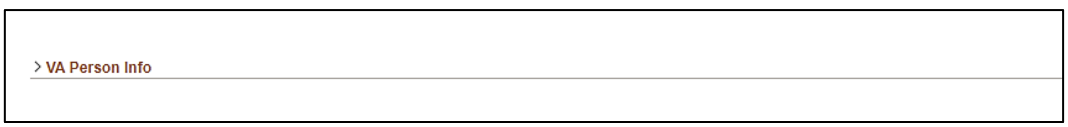
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>28.</td><td>Repeat Steps 19 – 27 for each Linked Dependent.</td></tr>
<tr><td>29.</td><td>Repeat the Validation process to save and submit the transaction – Steps 14 – 16.</td></tr>
<tr><td></td><td>The Linked Dependent relationship can now be viewed directly from the Health Plan Enrollment page.

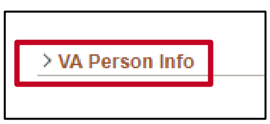

</td></tr>
<tr><td>30.</td><td>Click the THIS PARTICIPANT HAS A LINKED RELATIONSHIP link.

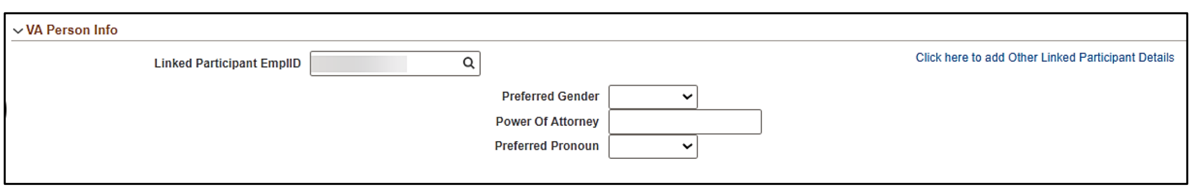

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">A new browser tab opens that displays the Personal Data page for the Dependent.


</td></tr>
<tr><td>31.</td><td>Scroll down to the VA Person Info section.


</td></tr>
<tr><td>32.</td><td>Click the VA Person Info link to expand the section.


</td></tr>
<tr><td colspan="2">The VA Person Info section expands and displays the Linked Participant information.


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