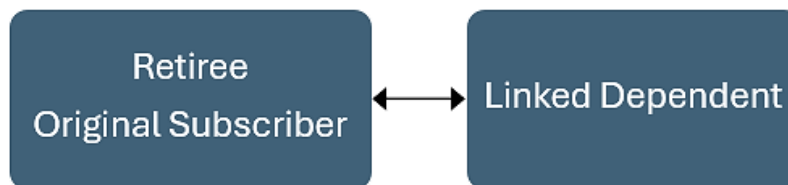


Linking Dependents and Retirees Overview

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

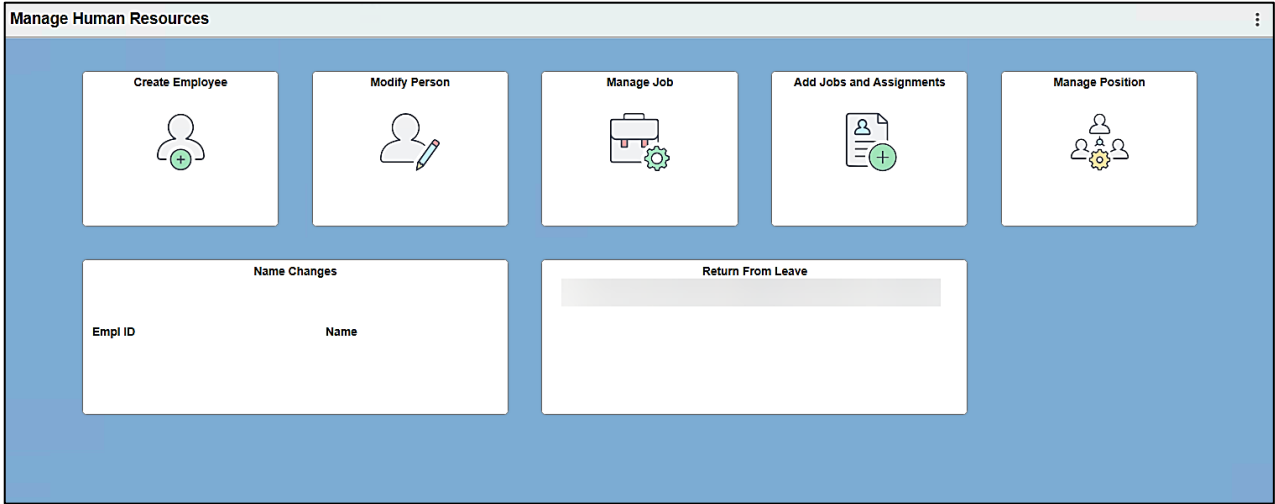
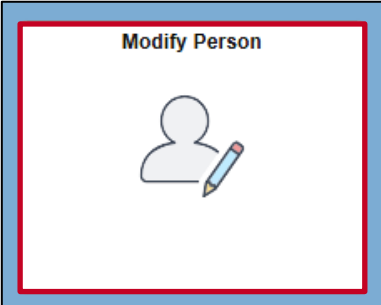
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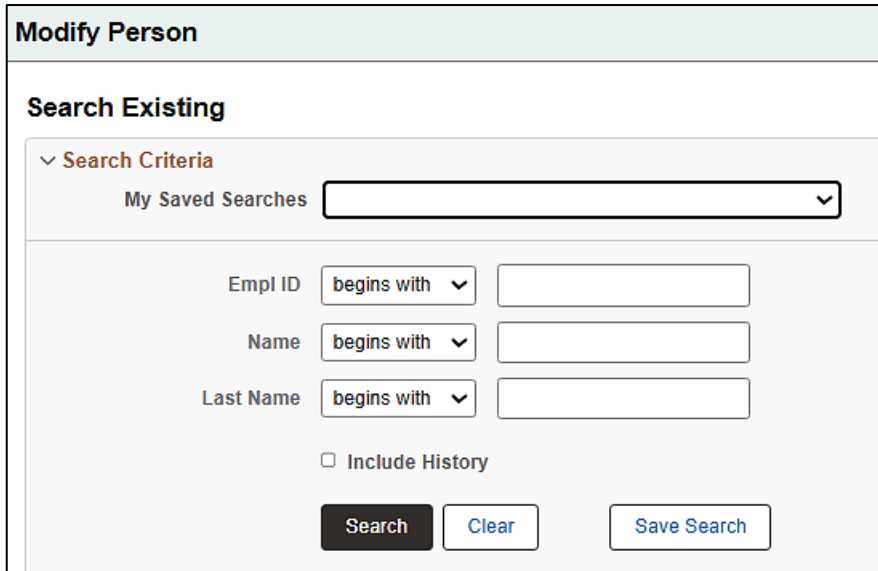
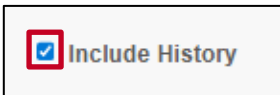
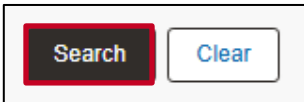


Revision History

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

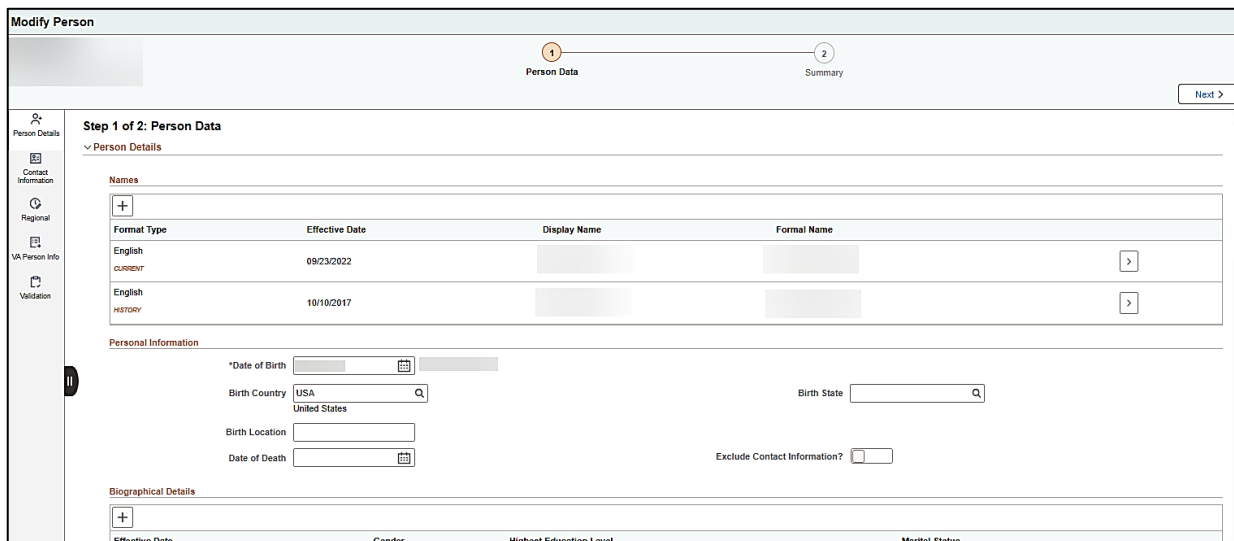
Linking Dependents and Retirees

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. 

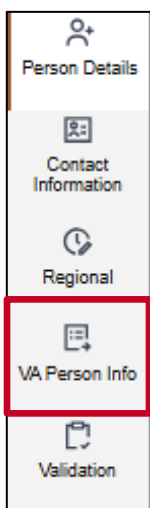
Step	Action
	The Modify Person Search Existing page displays. 
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
3.	Enter the Retiree's Employee 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. 

Step	Action
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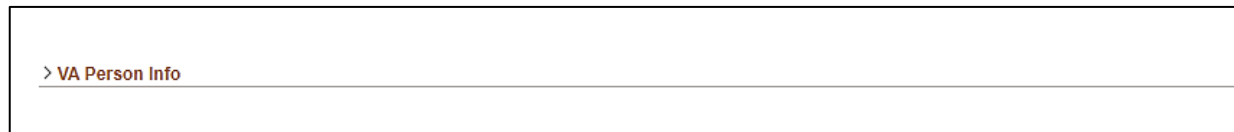
The **Modify Person** page displays for the Retiree, **Step 1 of 2: Person Data**, with the **Person Details** tab displayed by default.



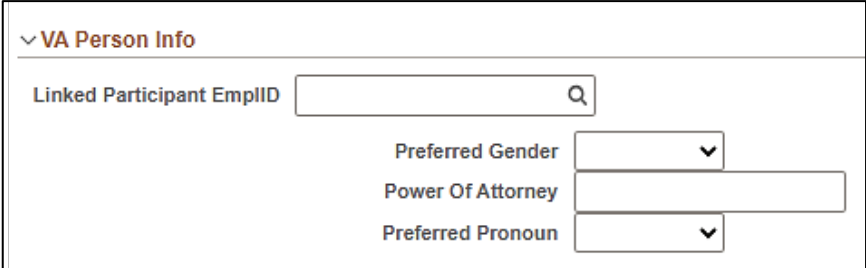
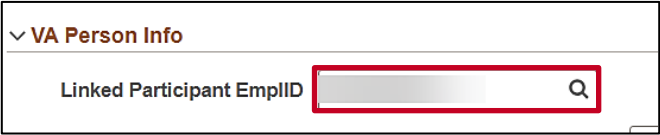
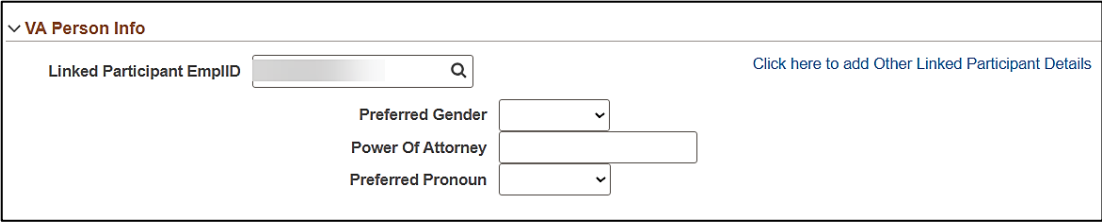
6. Click the **VA Person Info** tab.



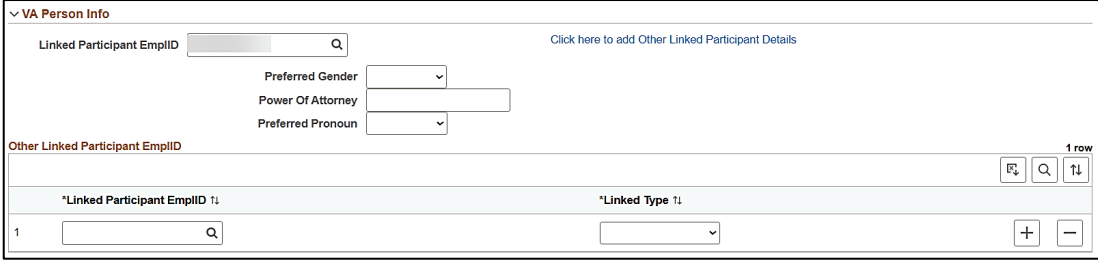
The **VA Person Info** section displays.

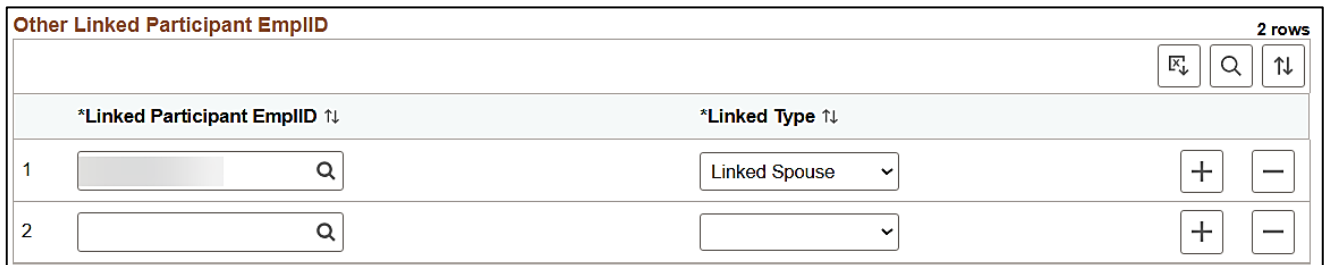


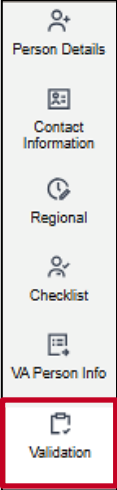
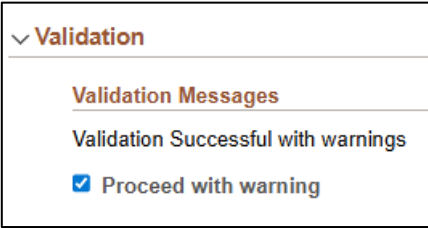


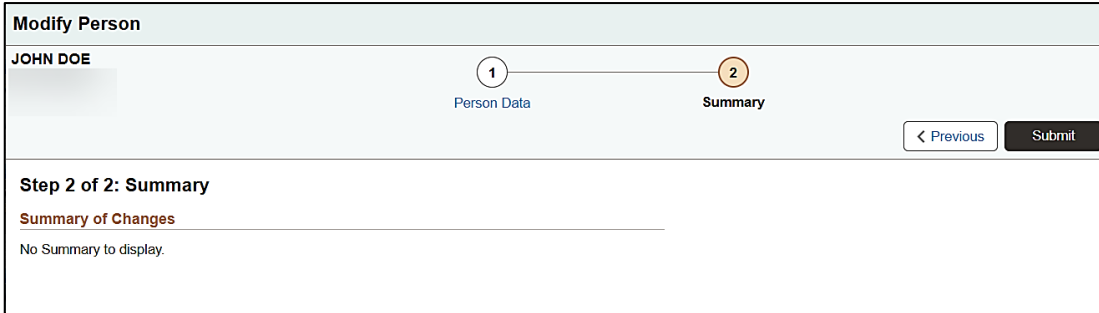
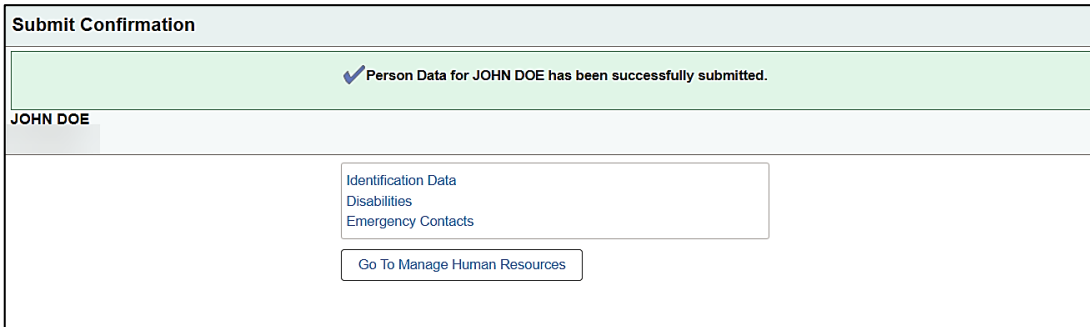
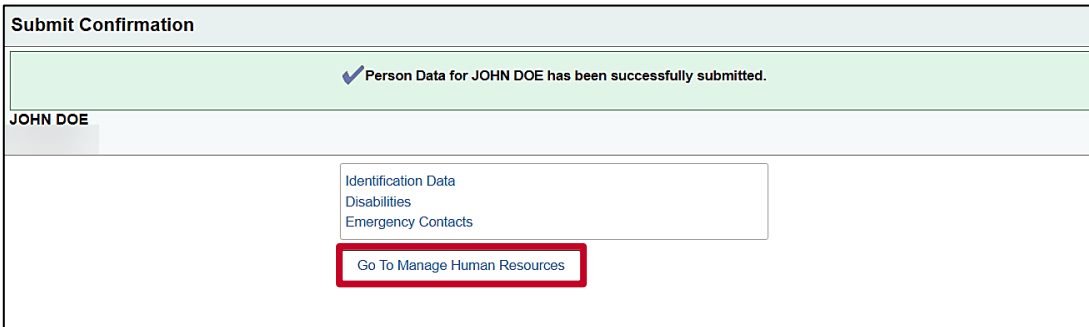
Step	Action
7.	Click the VA Person Info link to expand the section.  A screenshot of a web interface showing a link labeled "> VA Person Info" enclosed in a red rectangular box.
The VA Person Info section expands to show all the fields in this section.  A screenshot of the expanded "VA Person Info" section. It contains a "Linked Participant EmplID" field with a search icon, and three dropdown menus for "Preferred Gender", "Power Of Attorney", and "Preferred Pronoun".	
8.	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.  A screenshot of the "VA Person Info" section. The "Linked Participant EmplID" field is highlighted with a red rectangular box.
The Retiree's record is populated with the Linked Dependent's EmplID and the Click here to add Other Linked Participant Details link displays.  A screenshot of the "VA Person Info" section. The "Linked Participant EmplID" field is populated with a greyed-out value. A blue link labeled "Click here to add Other Linked Participant Details" is visible in the top right corner of the section.	
9.	Click the Click here to add Other Linked Participants Details link.  A screenshot of the "VA Person Info" section. The "Linked Participant EmplID" field is populated with a greyed-out value. A blue link labeled "Click here to add Other Linked Participant Details" is highlighted with a red rectangular box.

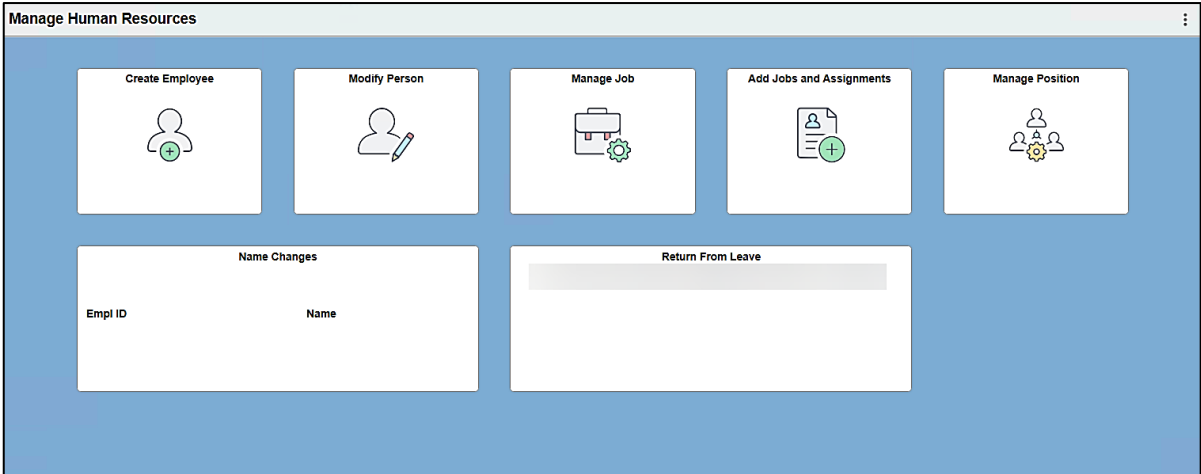
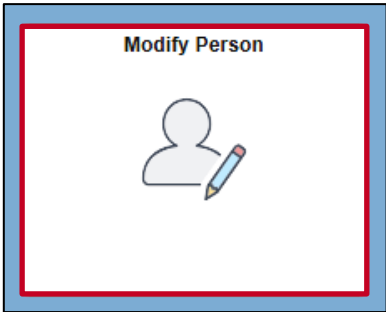
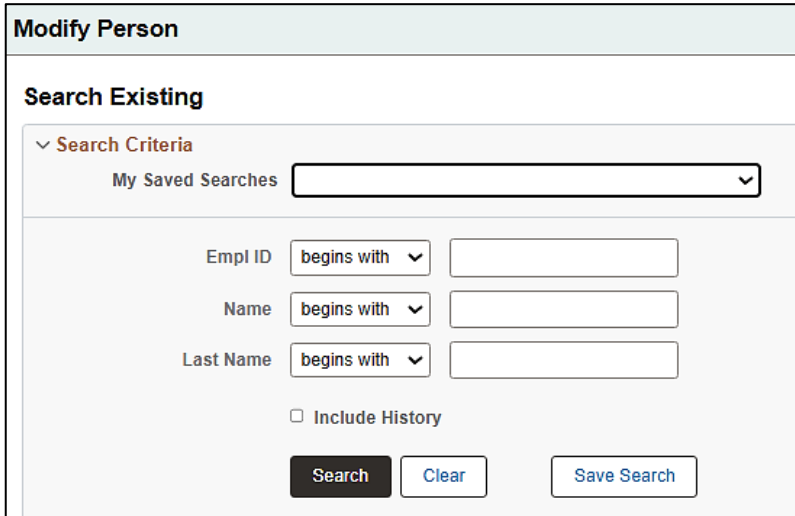


Step	Action
	The VA Person Info section redispays with the Other Linked Participant EmplID section available.  The screenshot shows the 'VA Person Info' section with a search bar for 'Linked Participant EmplID' and a link to 'Click here to add Other Linked Participant Details'. Below this, there are fields for 'Preferred Gender', 'Power Of Attorney', and 'Preferred Pronoun'. The 'Other Linked Participant EmplID' section is visible, showing a table with columns for '*Linked Participant EmplID' and '*Linked Type'. The table has one row with a search bar and a dropdown menu.
10.	Enter the Employee ID of the Dependent to be linked in the Linked Participant EmplID field.  The screenshot shows the 'Other Linked Participant EmplID' section with a table. The first row has a search bar for '*Linked Participant EmplID' and a dropdown for '*Linked Type'. The search bar is highlighted with a red box.
11.	Click the Linked Type dropdown button and select "Linked Child" or "Linked Spouse" as applicable.  The screenshot shows the '*Linked Type' dropdown menu with three options: 'Linked Child', 'Linked Spouse', and 'Original Subscriber'. The first two options are highlighted with a red box.

Step	Action
	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.
12.	If more than one Dependent needs to be linked, click the Add a New Row (+) button to add an additional Dependent. 
The Other Linked Participant EmplID section displays with the additional row. 	
13.	Repeat Steps 9 – 12 as needed for each Dependent to be linked to the Retiree.

Step	Action
14.	Click the Validation tab once all required updates are made. 
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. 
15.	Click the Next button once all required updates are made. 

Step	Action
	The Modify Person Step 2 of 2: Summary page displays the Summary of Changes. 
16.	Click the Submit button. 
	The Submit Confirmation page displays. 
	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.
17.	From the Submit Confirmation page, click the Go To Manage Human Resources link. 

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



Step	Action
19.	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. Empl ID begins with ▼
20.	Select the Include History checkbox option. ☒ Include History
21.	Click the Search button. Search Clear

The **Modify Person** page displays for the Dependent, **Step 1 of 2: Person Data**, with the **Person Details** tab displayed by default.

Modify Person

1 Person Data 2 Summary

Next >

Step 1 of 2: Person Data

Person Details

Names

Format Type	Effective Date	Display Name	Formal Name
English CURRENT	09/23/2022		
English HISTORY	10/10/2017		

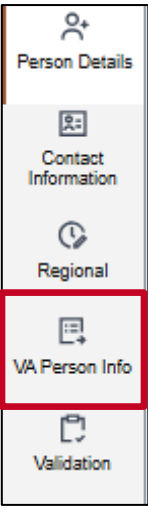
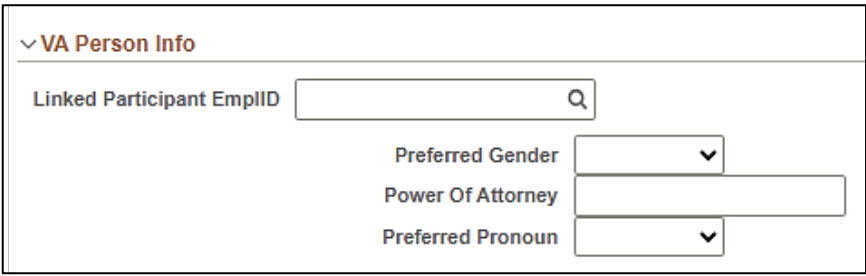
Personal Information

*Date of Birth Birth Country USA Birth State Birth Location Date of Death

Exclude Contact Information?

Biographical Details

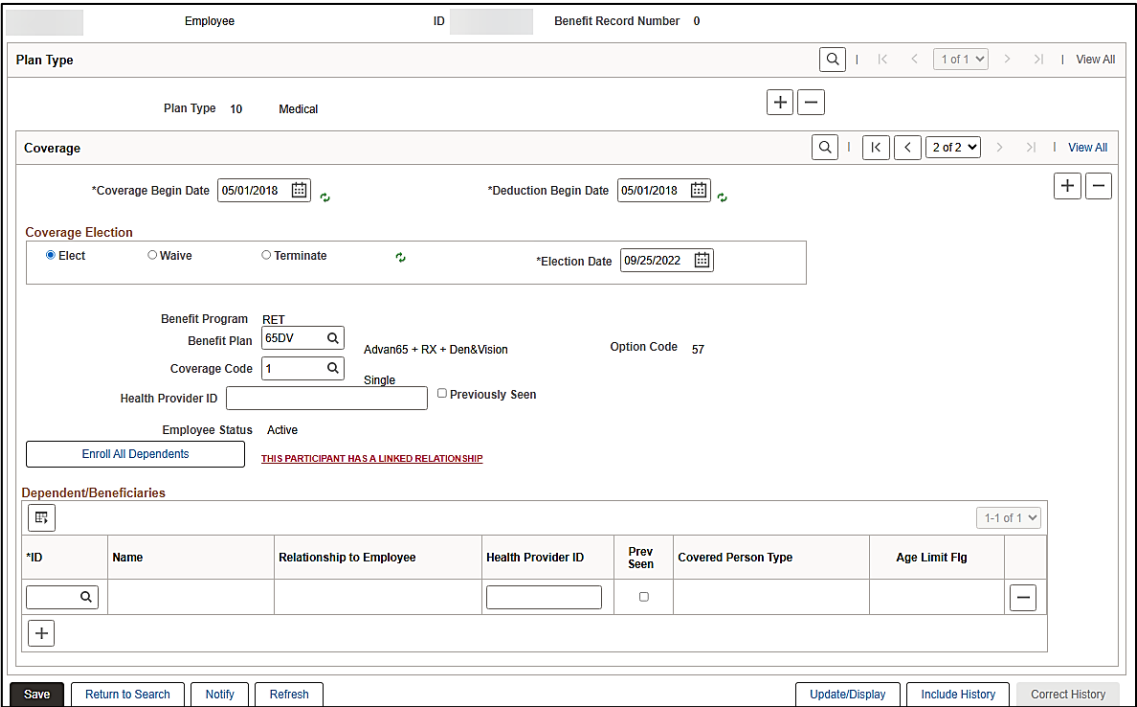
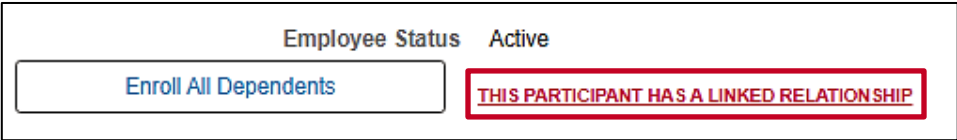
Effective Date	Gender	Highest Education Level	Marital Status
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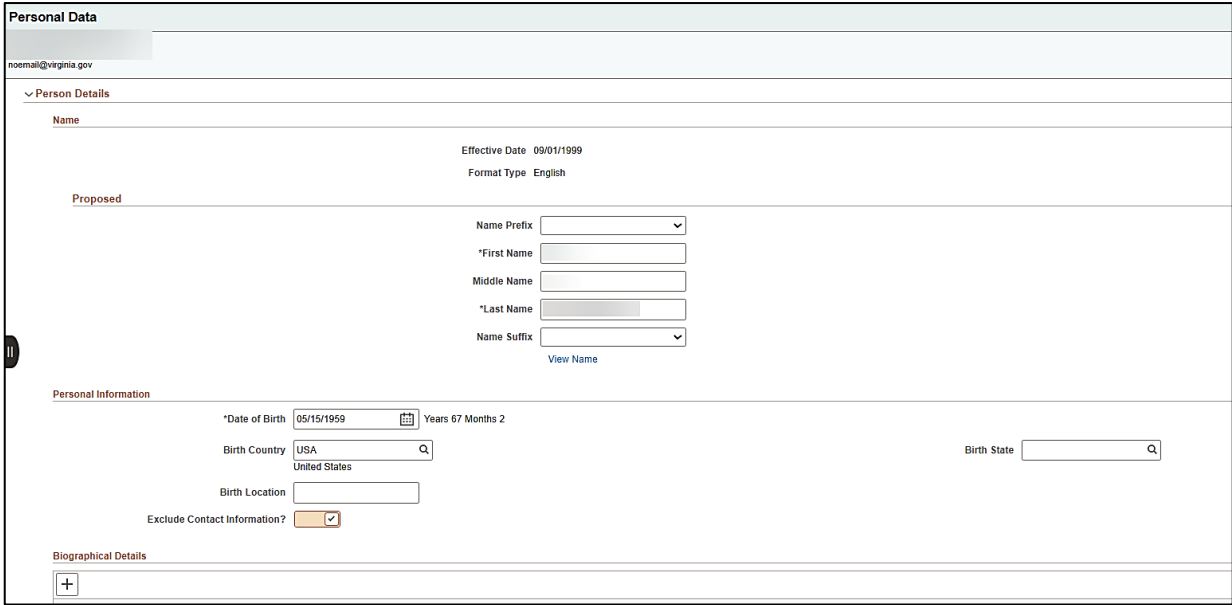
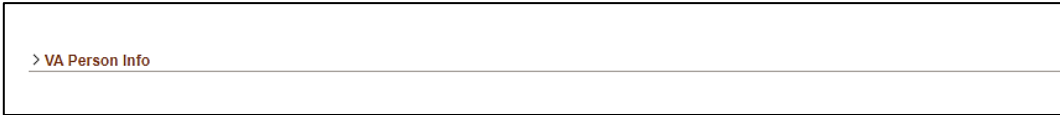
Step	Action
22.	Click the VA Person Info tab. 
The VA Person Info section displays. 	
23.	Click the VA Person Info link to expand the section. 
The VA Person Info section expands to show all the fields in this section. 	
24.	Enter the Employee ID of the Retiree to be linked in the Linked Participant EmplID field and tab out of the field. 



Step	Action
	The Dependent's record is populated with the Linked Retiree's EmplID and the Click here to add Other Linked Participant Details link displays. VA Person Info Linked Participant EmplID Q Click here to add Other Linked Participant Details Preferred Gender Power Of Attorney Preferred Pronoun
25.	Click the Click here to add Other Linked Participants Details link. VA Person Info Linked Participant EmplID Q Click here to add Other Linked Participant Details
	VA Person Info section redisplay with the Other Linked Participant EmplID section available. VA Person Info Linked Participant EmplID Q Click here to add Other Linked Participant Details Preferred Gender Power Of Attorney Preferred Pronoun Other Linked Participant EmplID 1 row *Linked Participant EmplID ↑↓ *Linked Type ↑↓ 1 Q + -
26.	Enter the Employee ID of the Retiree to be linked in the Linked Participant EmplID field. Other Linked Participant EmplID 1 row *Linked Participant EmplID ↑↓ *Linked Type ↑↓ 1 Q + -



Step	Action
28.	Repeat Steps 19 – 27 for each Linked Dependent.
29.	Repeat the Validation process to save and submit the transaction – Steps 14 – 16 .
	The Linked Dependent relationship can now be viewed directly from the Health Plan Enrollment page.  The screenshot shows the 'Health Plan Enrollment' page for an employee. It includes fields for Plan Type (Medical), Coverage (Begin Date: 05/01/2018, Deduction Begin Date: 05/01/2018), Coverage Election (Elect, Waive, Terminate), Election Date (09/25/2022), Benefit Program (RET), Benefit Plan (65DV), Coverage Code (1), Health Provider ID, Employee Status (Active), and a table for Dependents/Beneficiaries. A red link 'THIS PARTICIPANT HAS A LINKED RELATIONSHIP' is visible below the 'Enroll All Dependents' button.
30.	Click the THIS PARTICIPANT HAS A LINKED RELATIONSHIP link.  The screenshot shows a close-up of the 'Employee Status' section, which is 'Active'. Below it, there is a button 'Enroll All Dependents' and a red-bordered link 'THIS PARTICIPANT HAS A LINKED RELATIONSHIP'.

Step	Action
	A new browser tab opens that displays the Personal Data page for the Dependent. 
31.	Scroll down to the VA Person Info section. 
32.	Click the VA Person Info link to expand the section. 
	The VA Person Info section expands and displays the Linked Participant information. 