

Managing BA Contacts Overview

This Job Aid provides the steps utilized by Agency Benefits Administrators to manage the BA Contacts for their Business Unit/Group ID(s). It is critically important that the BA Contacts are maintained accurately within Cardinal. When employees make changes via Employee Self-Service (ESS), a notification is sent to the Benefits Administrator Contact Type.

Note: Cardinal recommends using a shared email address or distribution list to allow for notifications to be sent to a broader group of individuals. This Job Aid contains sections that provide the step-by-step instructions used to complete the following:

- Adding a new BA Contact
- Editing an existing BA Contact
- Deleting an existing BA Contact

This Job Aid does not apply to Agencies participating in The Local Choice Health Benefits Program (TLC). Localities enrolled in TLC should refer to the Job Aid titled **TLC Data Sheet**. This Job Aid is located on the Cardinal website in **Locality Training Materials** under **Locality User**.

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

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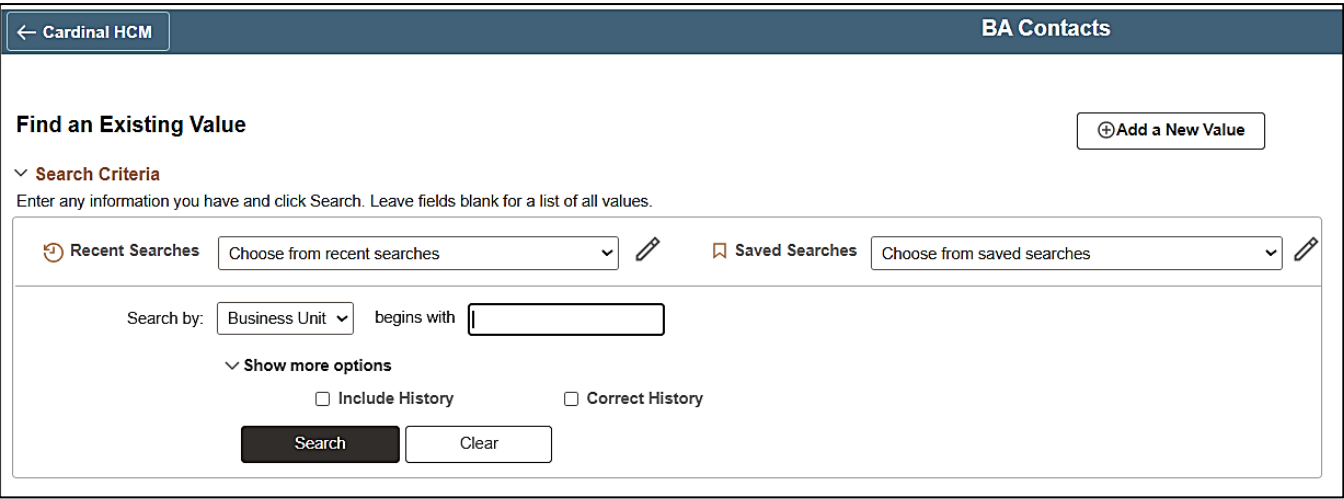
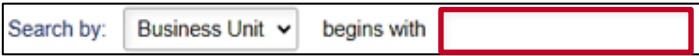


Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1 and 3; Section 2 , after Step 1 and 3; Section 3 , after Step 1 and 3). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Adding a New BA Contact

This section of the Job Aid should be used when adding a new BA Contact for a Business Unit/Group ID. There are six types of contacts that can be defined. Please note that each Contact Type is limited to one person.

Step	Action
1.	Navigate to the BA Contacts page using the following path: NavBar > Menu > Benefits > Employer Information > BA Contacts The BA Contacts 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 applicable Business Unit in the Business Unit field. 
3.	Click the Search button. 



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Step	Action
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The **BA Contacts** page refreshes and the search results display at the bottom of the page.

← Cardinal HCM

BA Contacts

Find an Existing Value

+ Add a New 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

Search by: Business Unit

begins with 60100

Show more options

☐ Include History

☐ Correct History

Search

Clear

Save Search

Search Results

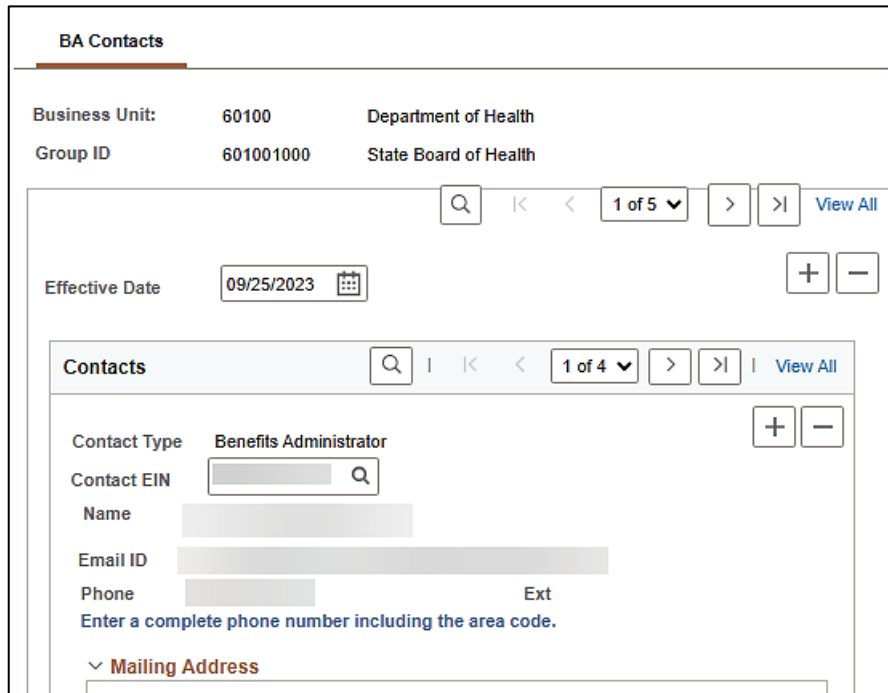
36 results - Business Unit "60100"

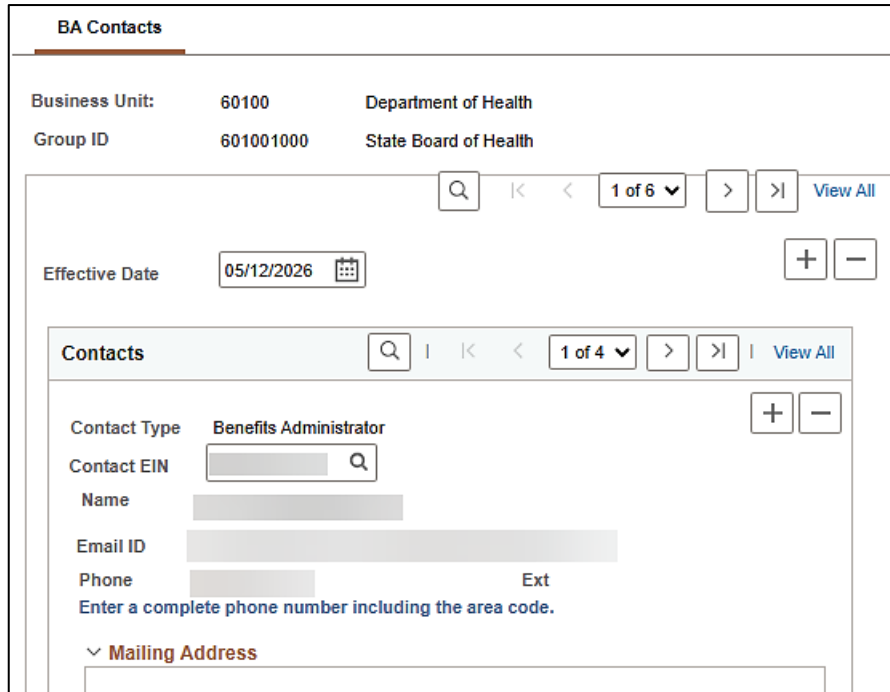
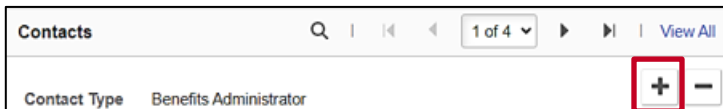
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View All

4. Click the **Drill In** icon (>) for the corresponding Group ID.

1-36 of 36			View All
Business Unit	Group ID		
60100	601001000	>	
60100	601002000	>	
60100	601003000	>	
60100	601004000	>	
60100	601005000	>	

Step	Action
	Each Group ID must be updated individually.
The BA Contacts page displays for the selected Group ID. 	
5.	Click the Add a New Row (+) icon to add a new effective dated row. 

Step	Action
	The BA Contacts page refreshes with a new effective dated row. 
6.	The Effective Date field defaults to the current system date. Update as needed using the Effective Date Calendar icon. 
7.	Click the Add a New Row (+) icon within the Contacts section. 



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Step	Action
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The **BA Contacts** page refreshes with a new row.

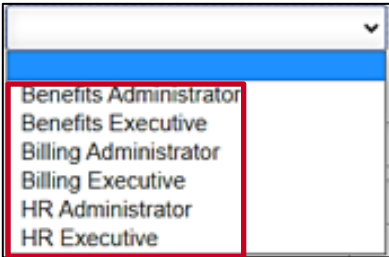
The screenshot shows the 'BA Contacts' page. At the top, there's a header 'BA Contacts'. Below it, the 'Business Unit' is '60100 Department of Health' and the 'Group ID' is '601001000 State Board of Health'. There's a search bar and navigation controls showing '1 of 6'. Below that, the 'Effective Date' is '05/12/2026'. The main section is titled 'Contacts' and shows a search bar and navigation controls for '2 of 5'. The form fields for a new contact are visible: '*Contact Type' (dropdown), 'Contact EIN' (text), 'Name' (text), 'Email ID' (text), 'Phone' (text), and 'Ext' (text). There's a note: 'Enter a complete phone number including the area code.' and a link for 'Mailing Address'.

8. Click the **Contact Type** dropdown button.

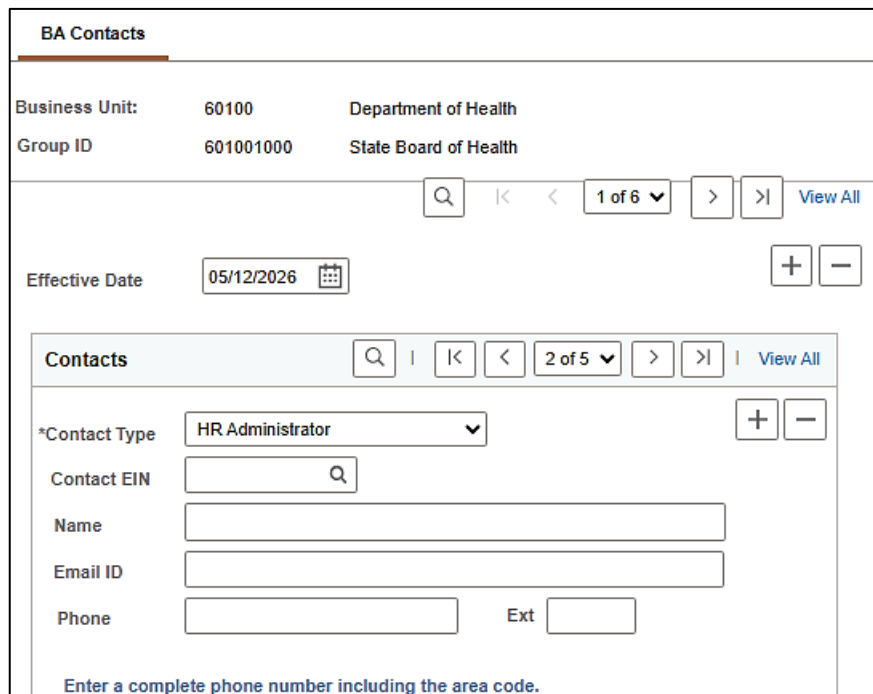
The screenshot shows the '*Contact Type' dropdown menu. The dropdown is open, showing a list of options: 'Benefits Administrator', 'Benefits Executive', 'Billing Administrator', 'Billing Executive', 'HR Administrator', and 'HR Executive'. The 'Benefits Administrator' option is highlighted.

The **Contact Type** menu displays.

The screenshot shows the 'Contacts' page with the '*Contact Type' dropdown menu open. The dropdown menu lists the following options: 'Benefits Administrator', 'Benefits Executive', 'Billing Administrator', 'Billing Executive', 'HR Administrator', and 'HR Executive'. The 'Benefits Administrator' option is highlighted. The form fields for 'Contact EIN', 'Name', 'Email ID', 'Phone', and 'Ext' are visible below the dropdown.

Step	Action
9.	Select the applicable Contact Type by clicking the corresponding list item based on the following: - The Benefits Administrator is the only required Contact Type and is the only contact who receives email notifications of updates made to dependent information through Employee Self-Service (ESS) - The Benefit Administrator, Benefits Executive, Billing Administrator, and Billing Executive Contact Type details are reported to DHRM - The HR Administrator and HR Executive Contact Types are for informational purposes only in Cardinal 

The **BA Contacts** page redisplay.

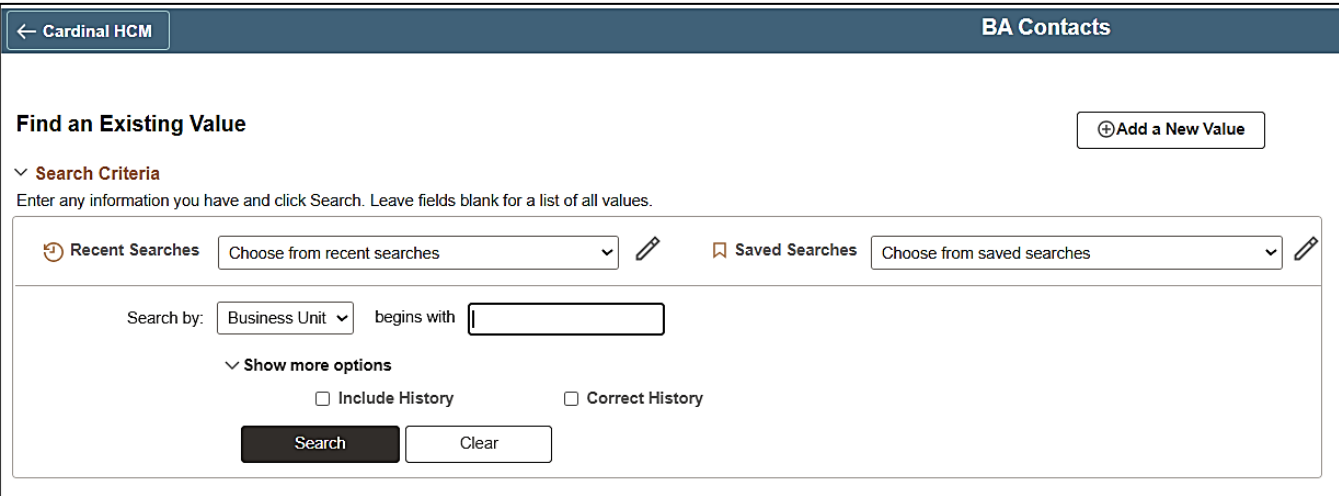
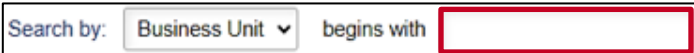


10.	Enter or select the applicable employee's Employee ID Number in the Contact EIN field. 
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Step	Action
	Once entered, the Name, Email ID, and Phone fields will automatically populate. Skip to Step 12. If a shared email address is being used, do not populate the Contact EIN field. In this case, proceed with the next step.
11.	Enter the applicable employee's email address or the shared email address into the Email ID field. Email ID
12.	Enter the applicable information in the Mailing Address section and Shipping Address section as needed. Mailing Address Address 1 Address 2 City State  Postal Shipping Address Address1 Address2 City State  Postal
13.	Click the Save button at the bottom of the page. Save Return to Search Previous in List Next in List
14.	Repeat Steps 4 - 13 for each Group ID within the Business Unit to add the new BA Contact as needed.

Editing an Existing BA Contact

This section of the Job Aid should be used when editing the information for an existing BA Contact for a Business Unit/Group ID. This functionality can be used to edit information such as the BA Contact's phone number information and address information. A group email address can also be edited using this functionality.

Step	Action
1.	Navigate to the BA Contacts page using the following path: NavBar > Menu > Benefits > Employer Information > BA Contacts The BA Contacts 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 applicable Business Unit in the Business Unit field. 
3.	Click the Search button. 



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Step	Action
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The **BA Contacts** page refreshes and the search results display at the bottom of the page.

← Cardinal HCM

BA Contacts

Find an Existing Value

+ Add a New 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

Search by:

Business Unit

begins with

60100

▼ Show more options

☐ Include History

☐ Correct History

Search

Clear

Save Search

▼ Search Results

36 results - Business Unit "60100"

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1-36 of 36

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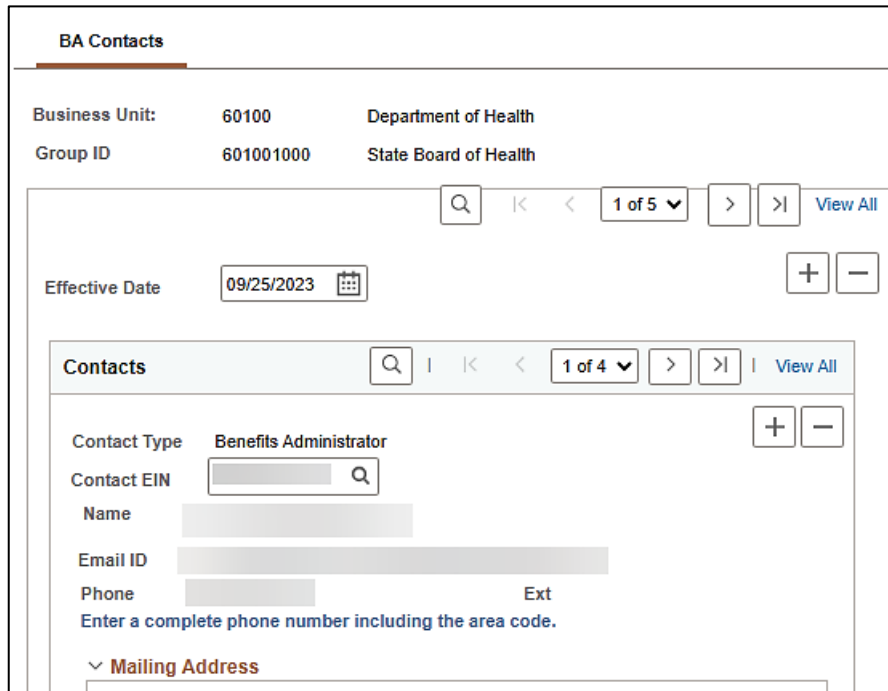
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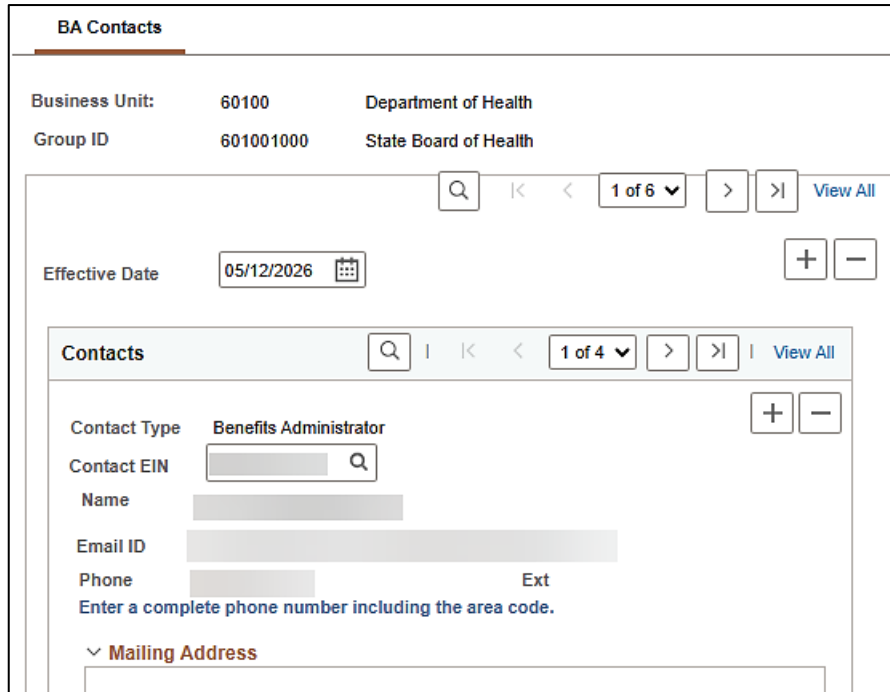
View All

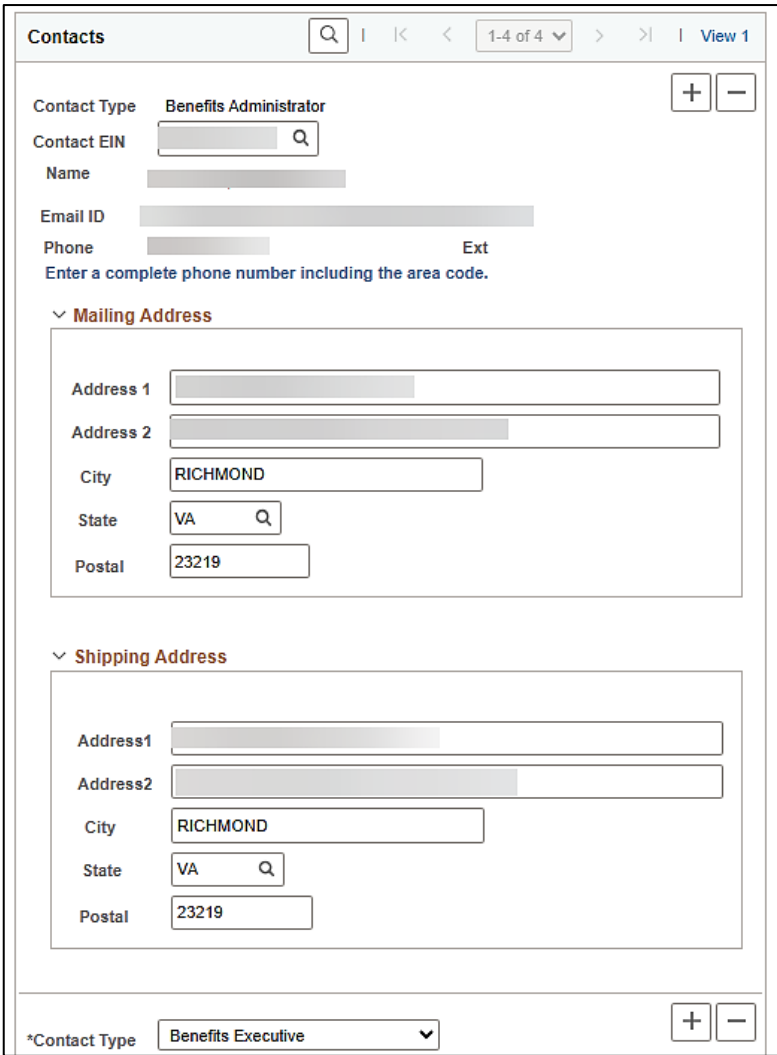
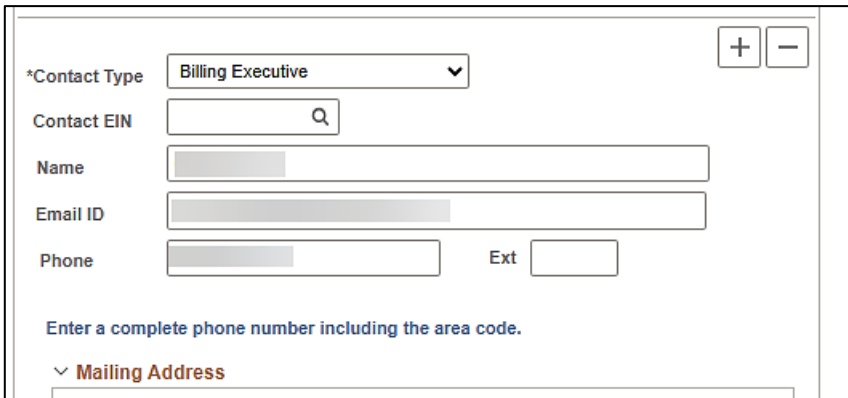
Business Unit	Group ID	
60100	601001000	>
60100	601002000	>
60100	601003000	>
60100	601004000	>
60100	601005000	>

4. Click the **Drill In** icon (>) for the corresponding Group ID.

<< < 1-36 of 36 > >> View All		
Business Unit	Group ID	
60100	601001000	>
60100	601002000	>
60100	601003000	>
60100	601004000	>
60100	601005000	>

Step	Action
	Each Group ID must be updated individually.
The BA Contacts page displays for the selected Group ID. 	
	A new effective dated row must be created before making the required edits to the BA Contact information.
5.	Click the Add a New Row (+) icon to add a new effective dated row. 

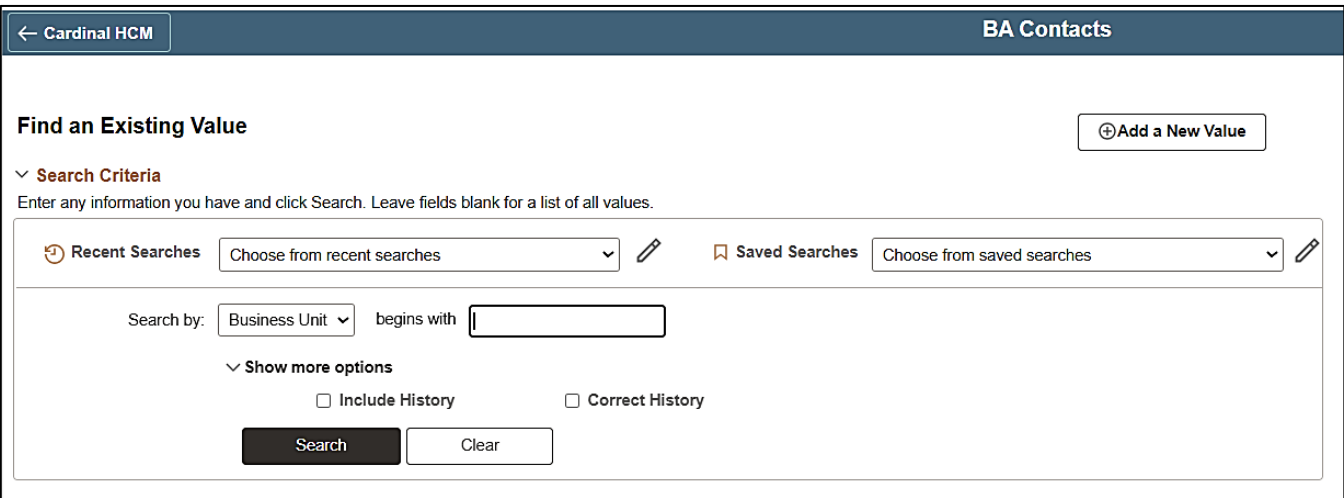
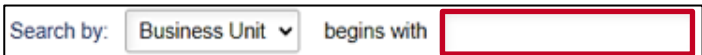
Step	Action
	The BA Contacts page refreshes with a new effective dated row. 
6.	The Effective Date field defaults to the current system date. Update as needed using the Effective Date Calendar icon. 
7.	Click the View All link within the Contacts section. 

Step	Action
	The page refreshes and all rows within the Contacts section are displayed. 
8.	Scroll down to the Contact Type that requires editing and make the applicable updates. 

Step	Action
	Edits can be made to the phone information or the address information. Group email address information can also be edited. If edits are required to the name or Contact EIN, the existing BA contact should be deleted, and the new BA Contact should be added.
9.	Click the Save button at the bottom of the page. Save Return to Search Previous in List Next in List
10.	Repeat Steps 4 - 9 for each Group ID within the Business Unit to edit this BA Contact as needed.

Deleting an Existing BA Contact

This section of the Job Aid should be used when deleting an existing BA Contact for a Business Unit/Group ID.

Step	Action
1.	Navigate to the BA Contacts page using the following path: NavBar > Menu > Benefits > Employer Information > BA Contacts The BA Contacts 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 applicable Business Unit in the Business Unit field. 
3.	Click the Search button. 



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Step

Action

The **BA Contacts** page refreshes and the search results display at the bottom of the page.

← Cardinal HCM

BA Contacts

Find an Existing Value

⊕ Add a New 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

✎

Search by: Business Unit

begins with 60100

▼ Show more options

☐ Include History

☐ Correct History

Search

Clear

🔖 Save Search

▼ Search Results

36 results - Business Unit "60100"

⏪ < 1-36 of 36 > ⏩ | View All

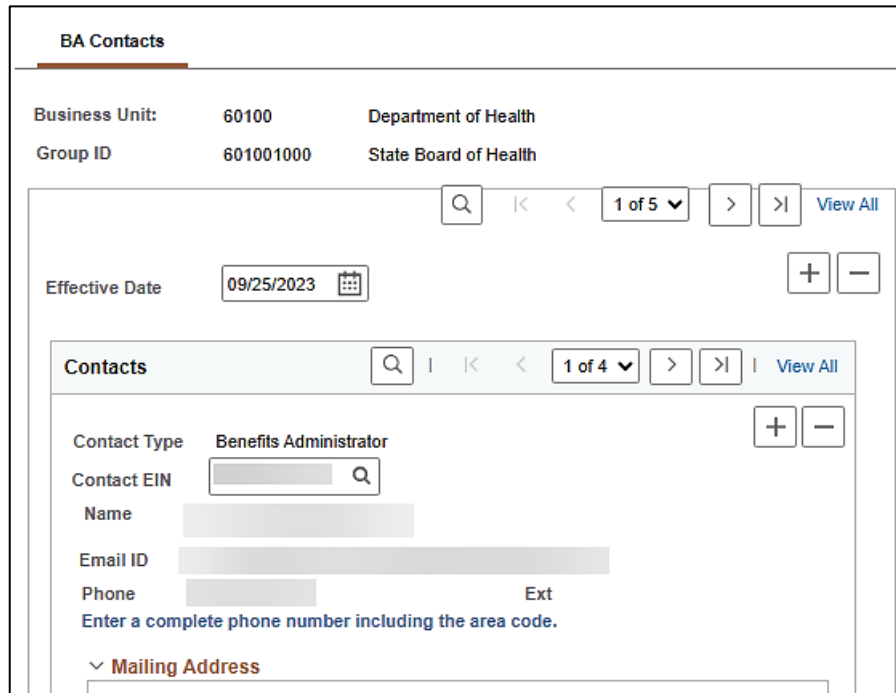
Business Unit	Group ID	
60100	601001000	>
60100	601002000	>
60100	601003000	>
60100	601004000	>
60100	601005000	>

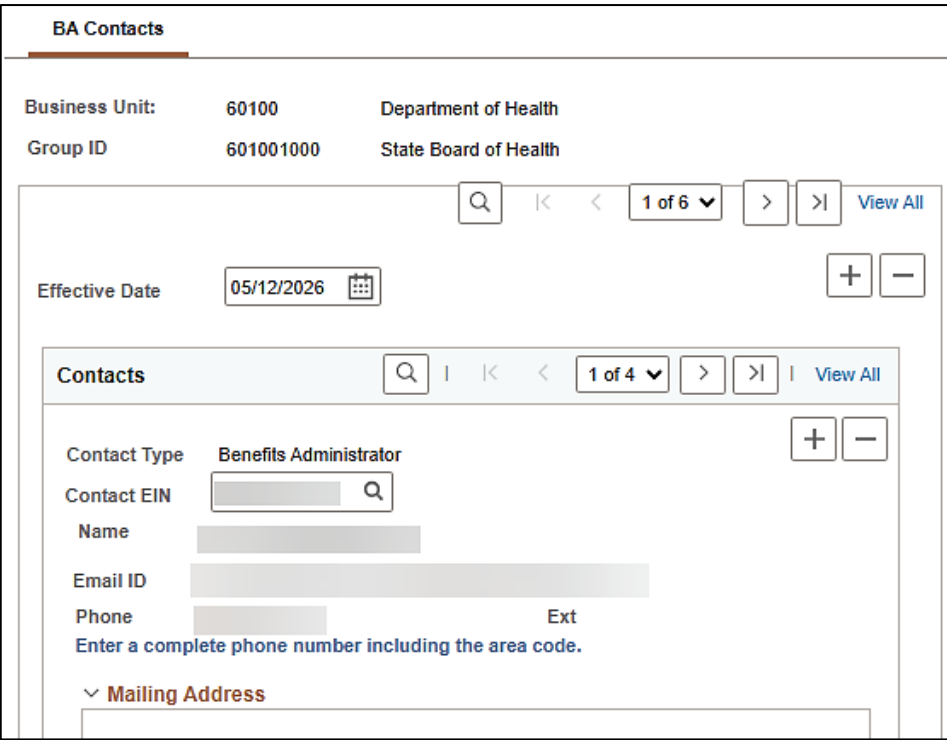
4.

Click the **Drill In** icon (>) for the corresponding Group ID.

⏪ < 1-36 of 36 > ⏩ | View All

Business Unit	Group ID	
60100	601001000	>
60100	601002000	>
60100	601003000	>
60100	601004000	>
60100	601005000	>

Step	Action
	Each Group ID must be updated individually.
The BA Contacts page displays for the selected Group ID. 	
	A new effective dated row must be created before making the required edits to the BA Contact information.
5.	Click the Add a New Row (+) icon to add a new effective dated row. 

Step	Action
	The BA Contacts page refreshes with a new effective dated row. 
6.	The Effective Date field defaults to the current system date. Update as needed using the Effective Date Calendar icon. 
7.	Click the View All link within the Contacts section. 

Step	Action
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The page refreshes and all rows within the **Contacts** section are displayed.

Contacts

1-4 of 4

View 1

Contact Type

Benefits Administrator

+

-

Contact EIN

Q

Name

Email ID

Phone

Ext

Enter a complete phone number including the area code.

▼ Mailing Address

Address 1

Address 2

City

RICHMOND

State

VA

Q

Postal

23219

▼ Shipping Address

Address1

Address2

City

RICHMOND

State

VA

Q

Postal

23219

*Contact Type

Benefits Executive

▼

+

-

8. Scroll down to the Contact Type that requires editing.

*Contact Type

Billing Executive

▼

+

-

Contact EIN

Q

Name

Email ID

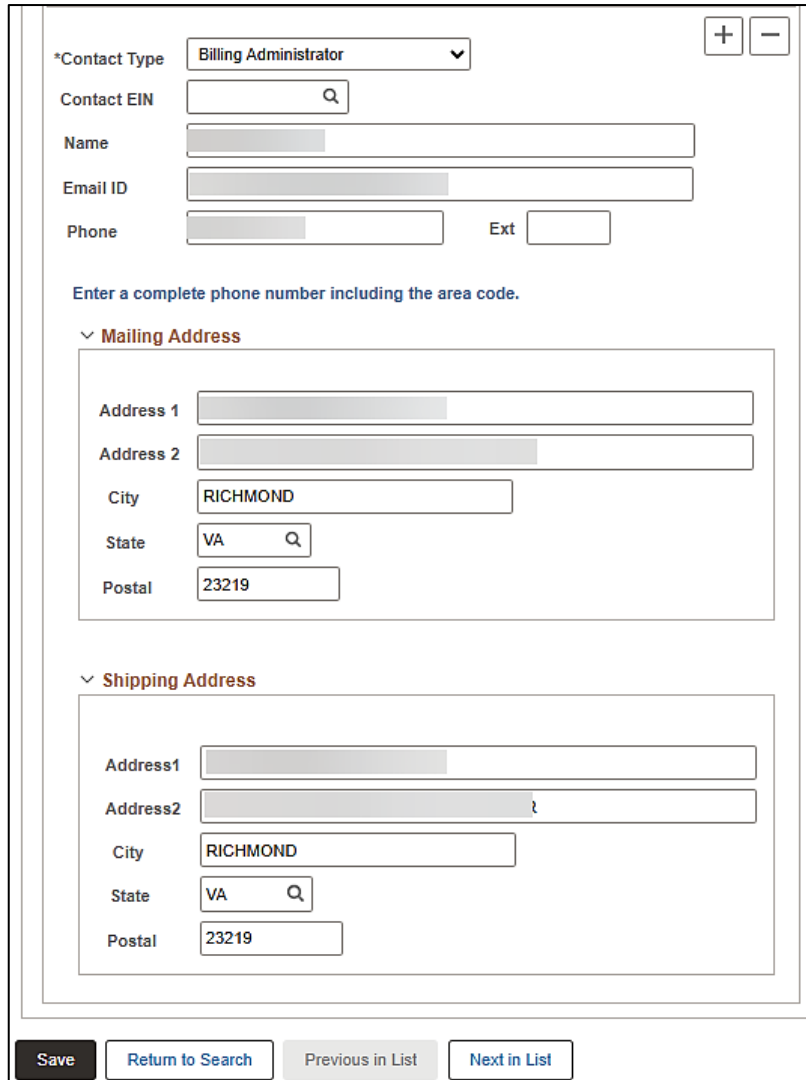
Phone

Ext

Enter a complete phone number including the area code.

▼ Mailing Address

Step	Action
9.	Click the Delete Row icon (-) for the applicable BA Contact. *Contact Type Billing Executive ▼ + -
A Confirmation message displays in a pop-up window. Delete current/selected rows from this page? The delete will occur when the transaction is saved. OK Cancel	
10.	Click the OK button to confirm the deletion. Delete current/selected rows from this page? The delete will occur when the transaction is saved. OK Cancel

Step	Action
	The BA Contacts page redispays. 
	The deleted BA Contact no longer displays.
11.	Click the Save button at the bottom of the page. 
12.	Repeat Steps 4 - 11 for each Group ID within the Business Unit to delete this BA Contact as needed.