

Managing and Approving Dependents Overview

This Job Aid provides the step-by-step instructions for an Agency Benefits Administrator to monitor those dependents that are currently in an “Unapproved Dependent” status. Unapproved dependents are not covered under the employee’s selected plan coverage and must be updated to a status of “Approved Dependent” once the applicable supporting documentation is provided by the employee. Review the dependents pending approval and follow up with the employee to ensure that the supporting documentation is provided within the established timeframe.

This Job Aid also provides the step-by-step instructions for an Agency Benefits Administrator (BA) to re-open and reprocess a Benefit Event after the Benefit Event was validated and finalized. Re-opening a Benefit Event may be required in any of the following circumstances:

- Additional dependents need to be enrolled
- Additional enrollments need to be completed
- Updates or corrections to the enrollments or dependents information are needed
- Dependents need to be updated from “Unapproved Dependent” to “Approved Dependent” when the required supporting documentation is provided by the employee
- Dependents need to be removed from the Health Plan enrollment because the documentation was not received or did not meet the eligibility requirement

Benefit Events should only be re-opened within their original enrollment window. Request permission from the Office of Health Benefits (OHB) prior to re-opening a Benefit Event outside of the original enrollment window.

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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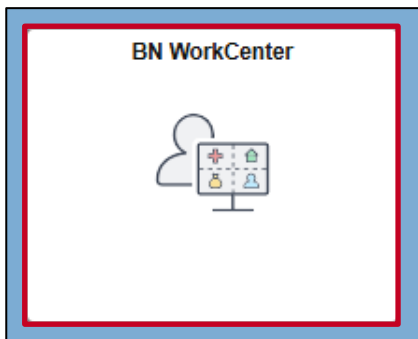
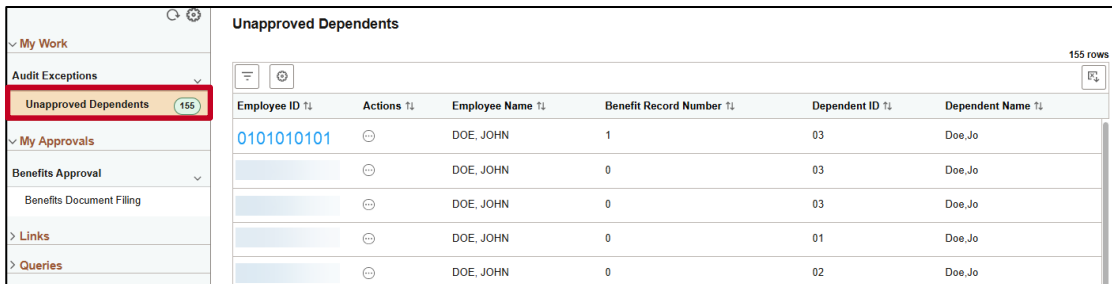
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/26/2026	New section added to Job Aid - Managing Dependent Personal Information .
3/1/2025	Updated the screenshots of the Search pages. Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

How to Approve a Dependent

Once the employee provides the applicable supporting documentation for the dependent(s) that were added to their plan coverage, the applicable Benefit Event will need to be re-opened and reprocessed in order to update the dependent(s) to a status of "Approved Dependent". This Benefit Event could have been triggered by:

- A Life Event manually created by a Benefits Administrator
- A Job Record (e.g., hire, re-hire, etc.)
- An Open Enrollment Event including the addition of dependents to coverage with supporting documentation provided as a hard copy.

Step	Action
1.	Navigate to the Unapproved Dependents 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: My Work > Audit Exceptions > Unapproved Dependents Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles. 



Step

Action

3.

Unapproved Dependents

155 rows

Employee ID TL	Actions TL	Employee Name TL	Benefit Record Number TL	Dependent ID TL	Dependent Name TL
0101010101	⊖	DOE, JOHN	1	03	Doe,Jo
	⊖	DOE, JOHN	0	03	Doe,Jo
	⊖	DOE, JOHN	0	03	Doe,Jo
	⊖	DOE, JOHN	0	01	Doe,Jo
	⊖	DOE, JOHN	0	02	Doe,Jo

The **On-Demand Event Maintenance** page displays in a pop-up window.

On-Demand Event Maintenance

Help

JOHN DOE

Person ID

Ben Record 1

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

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 Event Status Update button. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID Event Date Status Class Event Status Update
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Step	Action
------	--------

The **BenAdmin Event Status Update** page displays in a pop-up window.

BenAdmin Event Status Update

Empl ID **JOHN DOE** Ben Record 0

Event Status Update ?

Schedule ID EM00 Event Date 08/13/2026 Event ID 2 Event Class BIR Birth or Adoption Event Priority 410 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event

Event Disconnected

Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults

Print Option Print Both Forms *Process Normal Processing *Event Status Closed to Processing

Schedule ID 257COV Event Date 07/01/2025 Event ID 0 Event Class OE Open Enrollment Event Priority 900

Event Disconnected

Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults

Print Option Print Confirmation Forms Only

5. Review the events listed and identify the event used to enroll the dependent(s).

Note: Most of the time, this process involves searching for a New Hire, recent life event, or Open Enrollment event. In this example, it is a BIR (Birth or Adoption) Benefit Event. Once the event is identified, it will need to be re-opened to approve the dependent(s).

Event Status Update ?

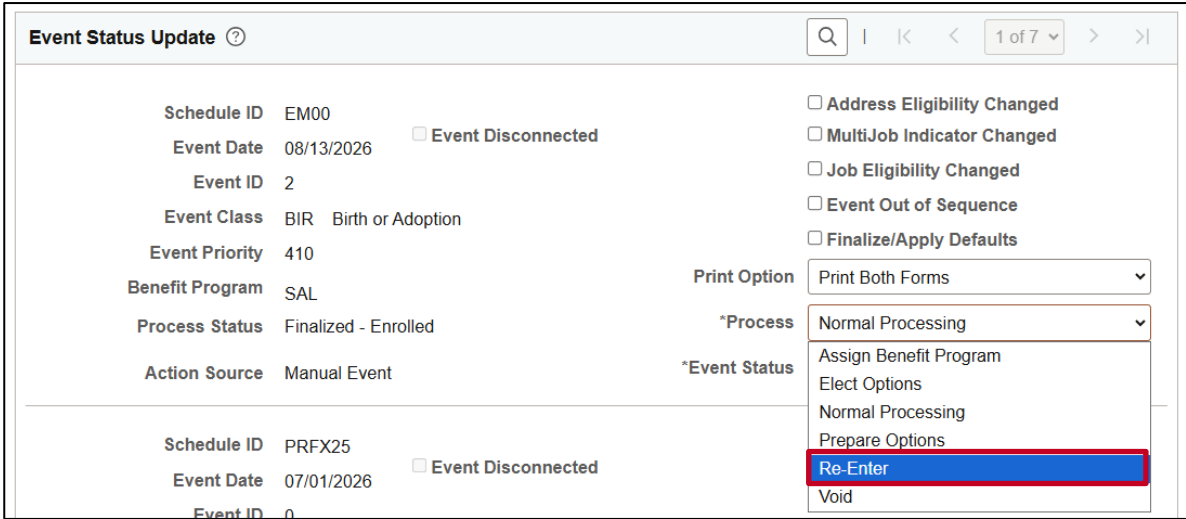
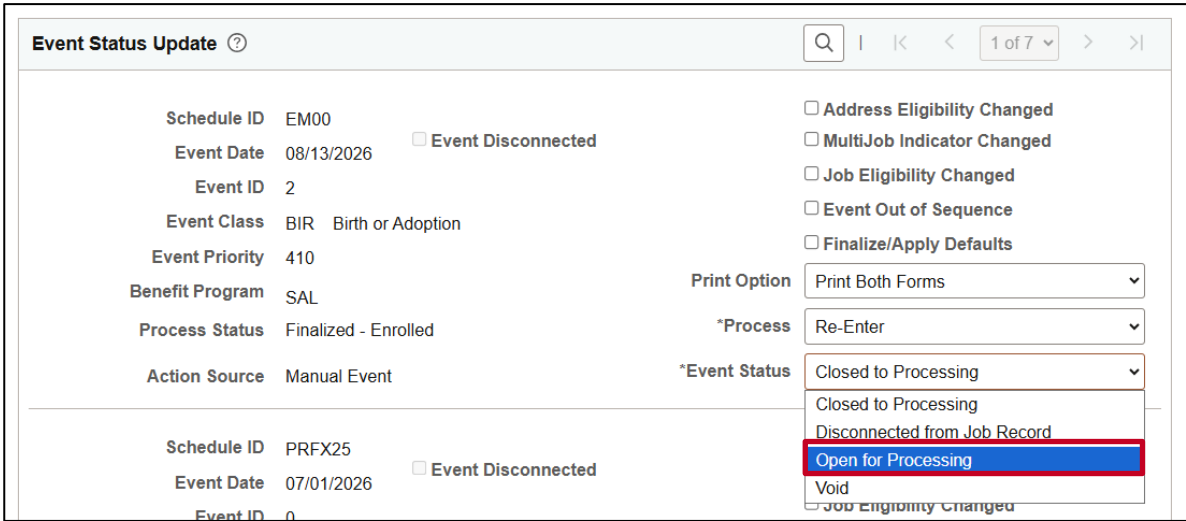
Schedule ID EM00 Event Date 08/13/2026 Event ID 2 Event Class **BIR Birth or Adoption** Event Priority 410 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event

Event Disconnected

Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults

Print Option Print Both Forms *Process Normal Processing *Event Status Closed to Processing



Step	Action
6.	Click the Process dropdown button and select “Re-Enter”. 
7.	Click the Event Status dropdown button and select “Open for Processing”. 
8.	Click the OK button at the bottom of the page. 

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

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

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 2

Event Date 08/13/2026

Status Finalized - Enrolled

Class BIR

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date 08/13/2026

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 R

Re-Enter

Save

Return to Search

Notify



The **Status** field still displays “Finalized – Enrolled”. The **Event Status** field now displays as “Open for Processing”. The **Process Indicator** field displays an “R” for Re-Enter. Notice that the **Election Entry** button is disabled.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 2

Event Date 08/13/2026

Status Finalized - Enrolled

Class BIR

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date 08/13/2026

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 R

Re-Enter

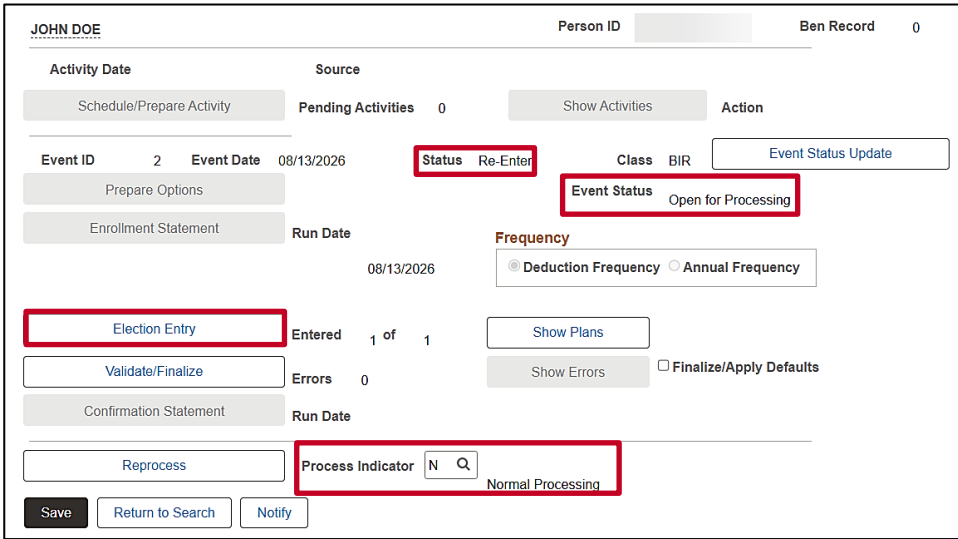
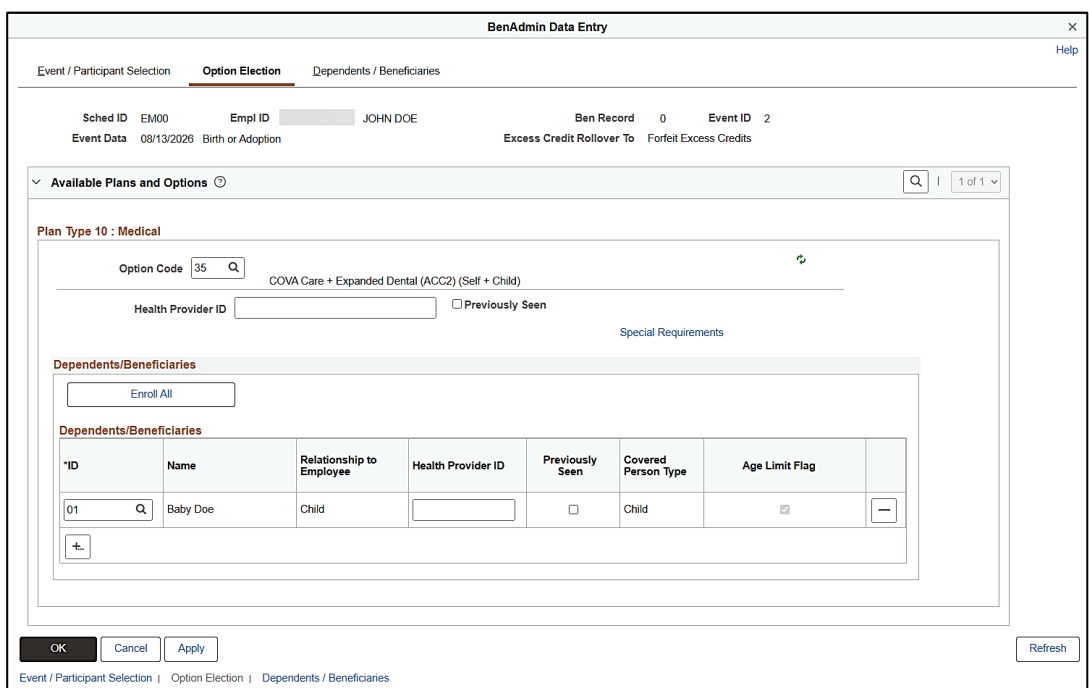
Save

Return to Search

Notify



Step	Action
9.	Click the Reprocess button. Reprocess
	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
10.	Click the OK button to close the message. OK
	The On-Demand Event Maintenance page redisplay. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 08/13/2026 Status Re-Enter Class BIR Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date 08/13/2026 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 Notify

Step	Action
	The Status field now displays “Re-Enter”. The Event Status field still displays as “Open for Processing”. The Process Indicator field now displays an “N” for Normal Processing. Notice that the Election Entry button is enabled. 
11.	Click the Election Entry button. 
The BenAdmin Data Entry page displays with the Option Election tab displayed by default. 	

Step	Action
12.	Click the Dependents / Beneficiaries tab. Event / Participant Selection Option Election Dependents / Beneficiaries

The **Dependents / Beneficiaries** tab displays.

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID EM00

Employee ID [REDACTED] JOHN DOE

Event ID 2

Event Data 08/13/2026 Birth or Adoption

Benefit Record 0

Excess Credit Rollover To Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Baby Doe	Child	Unapproved Dependent	08/13/2026

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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OK

Cancel

Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries

13.

Review the dependent(s) in the **Dependent/Beneficiaries Currently on Record** table. Note that the dependent(s) currently have a status of “Unapproved Dependent”.

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Baby Doe	Child	Unapproved Dependent	08/13/2026

Change/Add Dependent Data

14.

Click the **Change/Add Dependent Data** link.

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Baby Doe	Child	Unapproved Dependent	08/13/2026

Change/Add Dependent Data

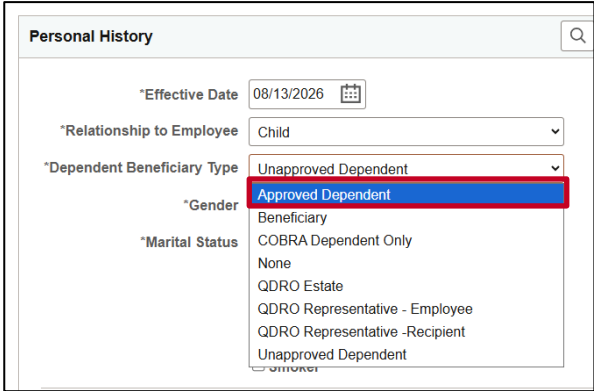


Benefits Job Aid

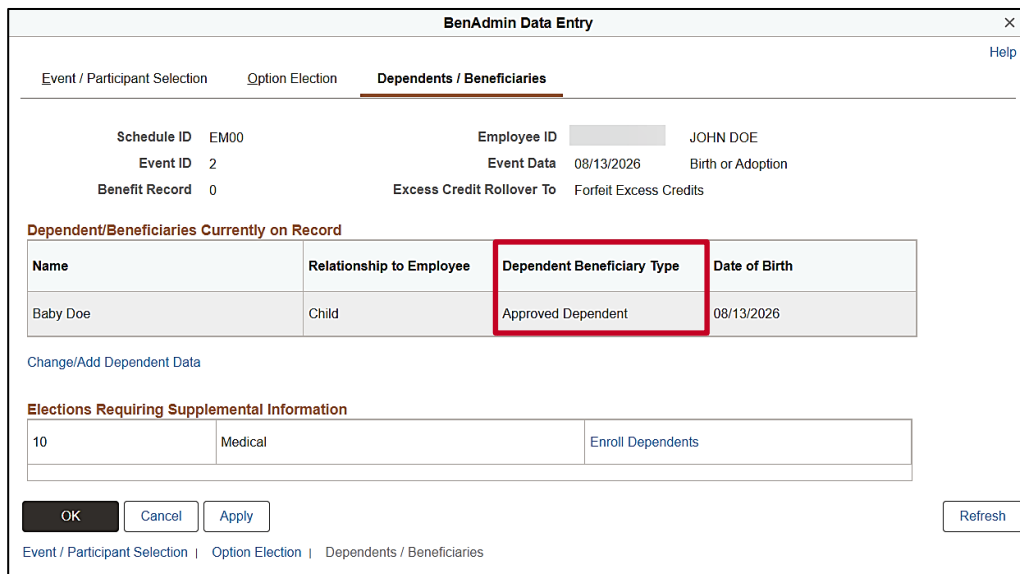
BN361 Managing and Approving Dependents

Step	Action
	The Dependent/Beneficiary page displays with the Name tab displayed by default. Dependent/Beneficiary Name Address Personal Profile JOHN DOE Person ID Dependent/Beneficiaries *Dependent/Beneficiary ID Name History *Effective Date *Format Type Name Baby Doe Edit Name OK Cancel Apply Name Address Personal Profile
15.	Click the Personal Profile tab. Name Address Personal Profile
	The Personal Profile tab displays. Dependent/Beneficiary Name Address Personal Profile JOHN DOE Person ID Personal Profile Dependent/Beneficiary ID Baby Doe *Date of Birth Birth Location Birth Country Birth State Date of Death Medicare Entitled Date Riders/Orders exist Riders/Orders Dependent Proof Qualified Dependent Last Updated 08/19/2026 Personal History *Effective Date *Relationship to Employee *Dependent Beneficiary Type *Gender



Step	Action
16.	Ensure the applicable dependent is being viewed.
17.	Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent". 
18.	Repeat these steps to update the status to "Approved Dependent" for any additional dependents as needed and then click the OK button at the bottom of the page. 

The **Dependents / Beneficiaries** tab redisplay with the updated **Dependent Beneficiary Type**.



BenAdmin Data Entry					
Event / Participant Selection		Option Election		Dependents / Beneficiaries	
Schedule ID	EM00	Employee ID		JOHN DOE	
Event ID	2	Event Data	08/13/2026	Birth or Adoption	
Benefit Record	0	Excess Credit Rollover To	Forfeit Excess Credits		
Dependent/Beneficiaries Currently on Record					
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth		
Baby Doe	Child	Approved Dependent	08/13/2026		
Change/Add Dependent Data					
Elections Requiring Supplemental Information					
10	Medical	Enroll Dependents			
OK Cancel Apply				Refresh	
Event / Participant Selection Option Election Dependents / Beneficiaries					



Step	Action
19.	Once all dependents have been changed from “Unapproved Dependent” to “Approved Dependent”, click the Option Election tab. Event / Participant Selection Option Election Dependents / Beneficiaries

The **Option Election** tab displays.

BenAdmin Data Entry

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

Sched ID: EM00 | Empl ID: JOHN DOE | Ben Record: 0 | Event ID: 2
Event Data: 08/13/2026 | Birth or Adoption | Excess Credit Rollover To: | Forfeit Excess Credits: |

Available Plans and Options

Plan Type 10: Medical

Option Code: 35

COVA Care + Expanded Dental (ACC2) (Self + Child)

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
01	Baby Doe	Child		☐	Child	☒

OK | Cancel | Apply | Refresh

20.

Review the **Dependents / Beneficiaries** table and ensure that are applicable dependents are listed. Click the **Enroll All** button.

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Baby Doe	Child		☐	Child	☒	—

+

A **Confirmation** message displays in a pop-up window.

All existing enrollments for this Plan will be deleted to make room for the new entries. (4000,60)

You have selected to mass enroll all eligible Dependents or Beneficiaries. To make room for these automatic enrollments, all existing individual enrollments will first be removed, along with any current election information.

OK | Cancel

21.	Click the OK button. OK Cancel
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Step	Action
22.	Click the OK button at the bottom of the page. OK Cancel Apply

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

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 2

Event Date 08/13/2026

Status Entered

Class BIR

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 Q

Normal Processing

Save

Return to Search

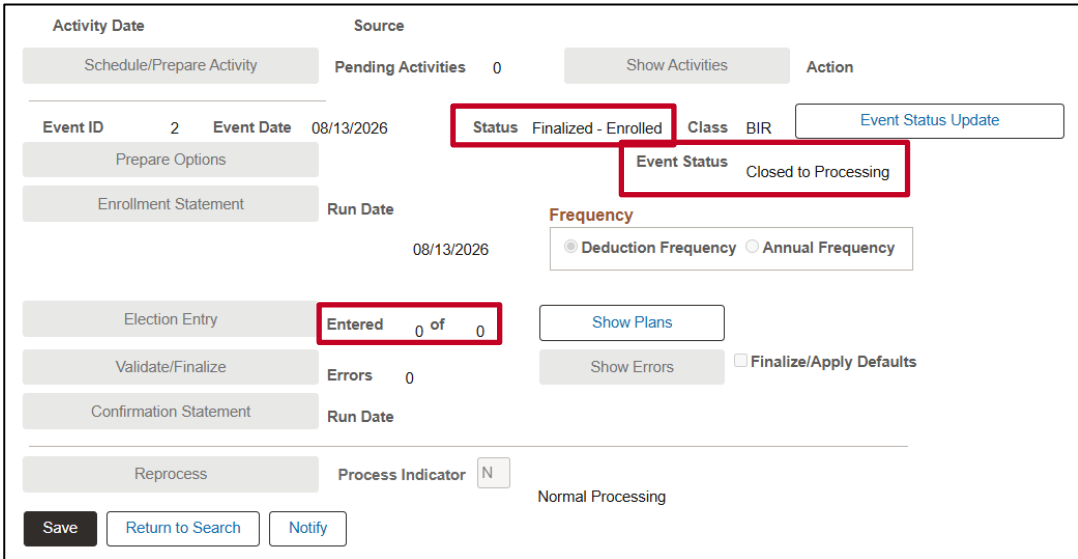
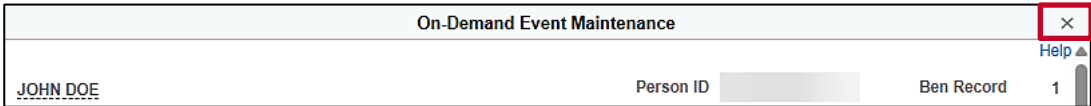
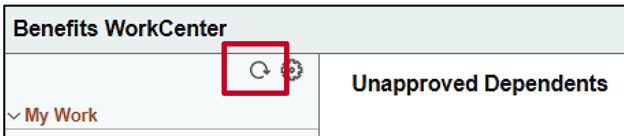
Notify

23.	Confirm that the Status field now displays as “Entered” and the Event Status field is still “Open for Processing”.
	JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 08/13/2026 Status Entered Class BIR Event Status Update Prepare Options Event Status Open for Processing

24.	Click the Validate/Finalize button.
	Election Entry Entered 1 of 1 Validate/Finalize Errors 0 Confirmation Statement Run Date



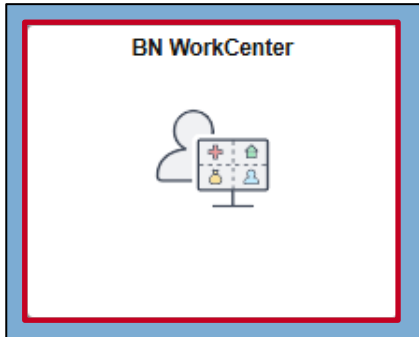
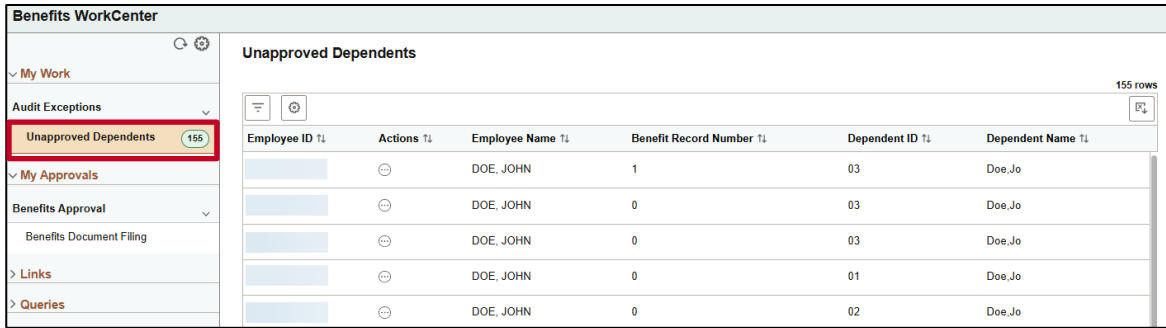
Step	Action
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
25.	Click the OK button. OK
	The On-Demand Event Maintenance page redisplay. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 08/13/2026 Status Finalized - Enrolled Class BIR Event Status Update Prepare Options Event Status Closed to Processing Enrollment Statement Run Date 08/13/2026 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

Step	Action
26.	Confirm that the Status field now displays as “Finalized-Enrolled” and the Event Status field is now “Closed to Processing”. Note: The number of elections entered will reset back to “0 of 0”. 
27.	Click the Close button (X) to close the window. 
28.	Refresh the list by clicking the Refresh button at the top of the Benefits WorkCenter. 
	The dependent is removed from the list and the count is reduced. Repeat the process as needed.

How to Remove an Unapproved Dependent

If no documentation is provided or the documentation does not meet the eligibility requirements for the dependent(s) that were added to their plan coverage, the applicable Benefit Event will need to be re-opened and reprocessed in order to remove the dependent(s) from the Health Plan enrollment election. This Benefit Event could have been triggered by:

- A Life Event manually created by a Benefits Administrator
- A Job Record (e.g., hire, re-hire, etc.)
- An Open Enrollment Event including the addition of dependents to coverage with supporting documentation provided as a hard copy.

Step	Action
1.	Navigate to the Unapproved Dependents 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: My Work > Audit Exceptions > Unapproved Dependents Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles. 



Benefits Job Aid

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Step

Action

3.

Click the **Employee ID** link of the unapproved dependent.

Unapproved Dependents

155 rows

Employee ID ↕

Actions ↕

Employee Name ↕

Benefit Record Number ↕

Dependent ID ↕

Dependent Name ↕

0101010101

DOE, JOHN

1

03

Doe,Jo

DOE, JOHN

0

03

Doe,Jo

DOE, JOHN

0

03

Doe,Jo

DOE, JOHN

0

01

Doe,Jo

DOE, JOHN

0

02

Doe,Jo

The **On-Demand Event Maintenance** page displays in a pop-up window.

On-Demand Event Maintenance × [Help](#)

JOHN DOE Person ID Ben Record 1

Activity Date Source

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

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 Notify

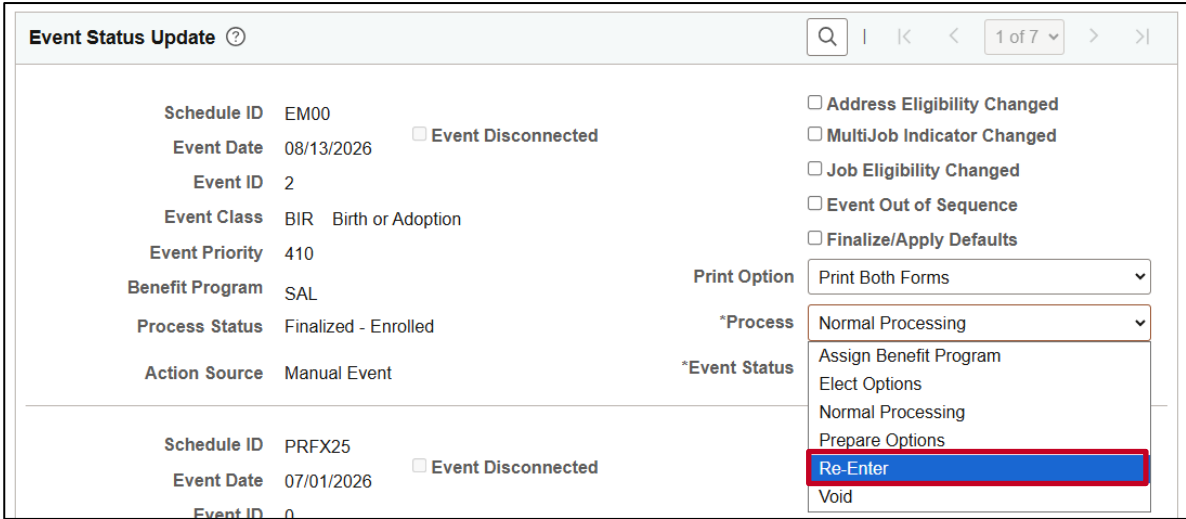
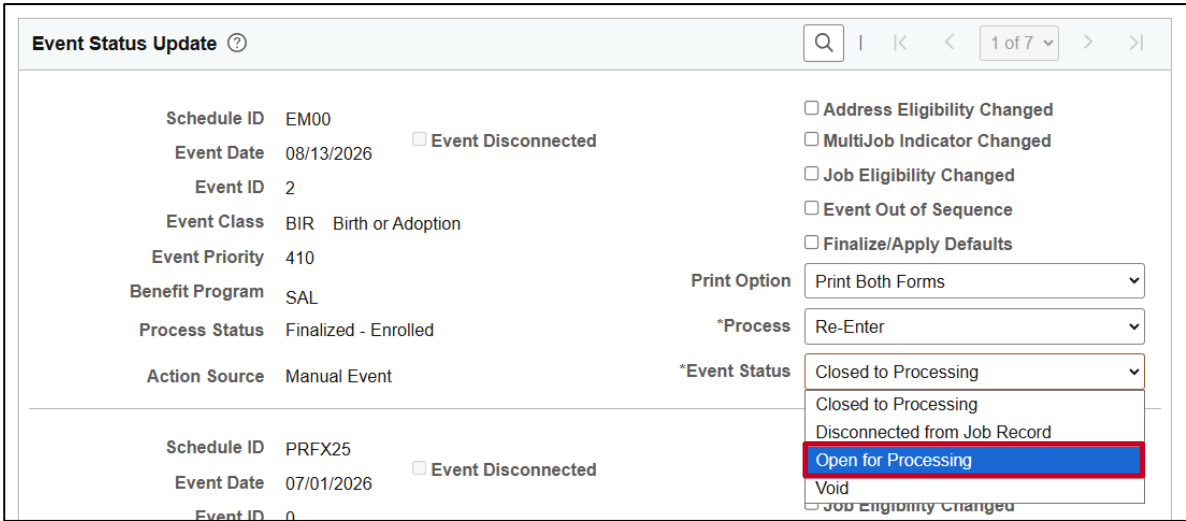
4.	Click the Event Status Update button. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID Event Date Status Class Event Status Update
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Benefits Job Aid

BN361 Managing and Approving Dependents

Step	Action
	The BenAdmin Event Status Update page displays in a pop-up window. BenAdmin Event Status Update Empl ID JOHN DOE Ben Record 0 Event Status Update ? Schedule ID EM00 Event Date 08/13/2026 Event ID 2 Event Class BIR Birth or Adoption Event Priority 410 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event ☐ Event Disconnected ☐ Address Eligibility Changed ☐ MultiJob Indicator Changed ☐ Job Eligibility Changed ☐ Event Out of Sequence ☐ Finalize/Apply Defaults Print Option Print Both Forms *Process Normal Processing *Event Status Closed to Processing Schedule ID 257COV Event Date 07/01/2025 Event ID 0 Event Class OE Open Enrollment Event Priority 900 ☐ Event Disconnected ☐ Address Eligibility Changed ☐ MultiJob Indicator Changed ☐ Job Eligibility Changed ☐ Event Out of Sequence ☐ Finalize/Apply Defaults Print Option Print Confirmation Forms Only
5.	Review the events listed and identify the event used to enroll the dependent(s). Note: Most of the time, this process involves searching for a New Hire, recent life event, or Open Enrollment event. In this example, it is a BIR (Birth) Benefit Event. Once the event is identified, it will need to be re-opened to remove the dependent(s). Event Status Update ? Schedule ID EM00 Event Date 08/13/2026 Event ID 2 Event Class BIR Birth or Adoption Event Priority 410 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event ☐ Event Disconnected ☐ Address Eligibility Changed ☐ MultiJob Indicator Changed ☐ Job Eligibility Changed ☐ Event Out of Sequence ☐ Finalize/Apply Defaults Print Option Print Both Forms *Process Normal Processing *Event Status Closed to Processing

Step	Action
6.	Click the Process dropdown button and select “Re-Enter”.  The screenshot shows the 'Event Status Update' form. On the right side, the '*Process' dropdown menu is open, displaying options: Normal Processing, Assign Benefit Program, Elect Options, Normal Processing, Prepare Options, Re-Enter (highlighted with a red border), and Void. The form fields on the left include Schedule ID (EM00), Event Date (08/13/2026), Event ID (2), Event Class (BIR - Birth or Adoption), Event Priority (410), Benefit Program (SAL), Process Status (Finalized - Enrolled), and Action Source (Manual Event).
7.	Click the Event Status dropdown button and select “Open for Processing”.  The screenshot shows the 'Event Status Update' form. On the right side, the '*Event Status' dropdown menu is open, displaying options: Closed to Processing, Closed to Processing, Disconnected from Job Record, Open for Processing (highlighted with a red border), and Void. The form fields on the left include Schedule ID (EM00), Event Date (08/13/2026), Event ID (2), Event Class (BIR - Birth or Adoption), Event Priority (410), Benefit Program (SAL), Process Status (Finalized - Enrolled), and Action Source (Manual Event).
8.	Click the OK button at the bottom of the page.  The screenshot shows the bottom of the page with three buttons: OK (highlighted with a red border), Cancel, and Apply.

Step	Action
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The **On-Demand Event Maintenance** page redisplay.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 2

Event Date 08/13/2026

Status Finalized - Enrolled

Class BIR

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

08/13/2026

Election Entry

Entered 1 of 1

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator R

Re-Enter

Save

Return to Search

Notify



The **Status** field still displays “Finalized – Enrolled”. The **Event Status** field now displays as “Open for Processing”. The **Process Indicator** field displays an “R” for Re-Enter. Notice that the **Election Entry** button is disabled.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 2

Event Date 08/13/2026

Status Finalized - Enrolled

Class BIR

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

08/13/2026

Election Entry

Entered 1 of 1

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator R

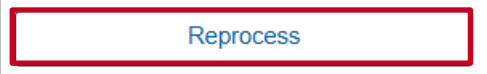
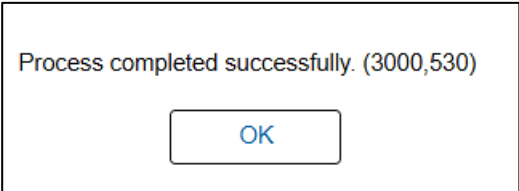
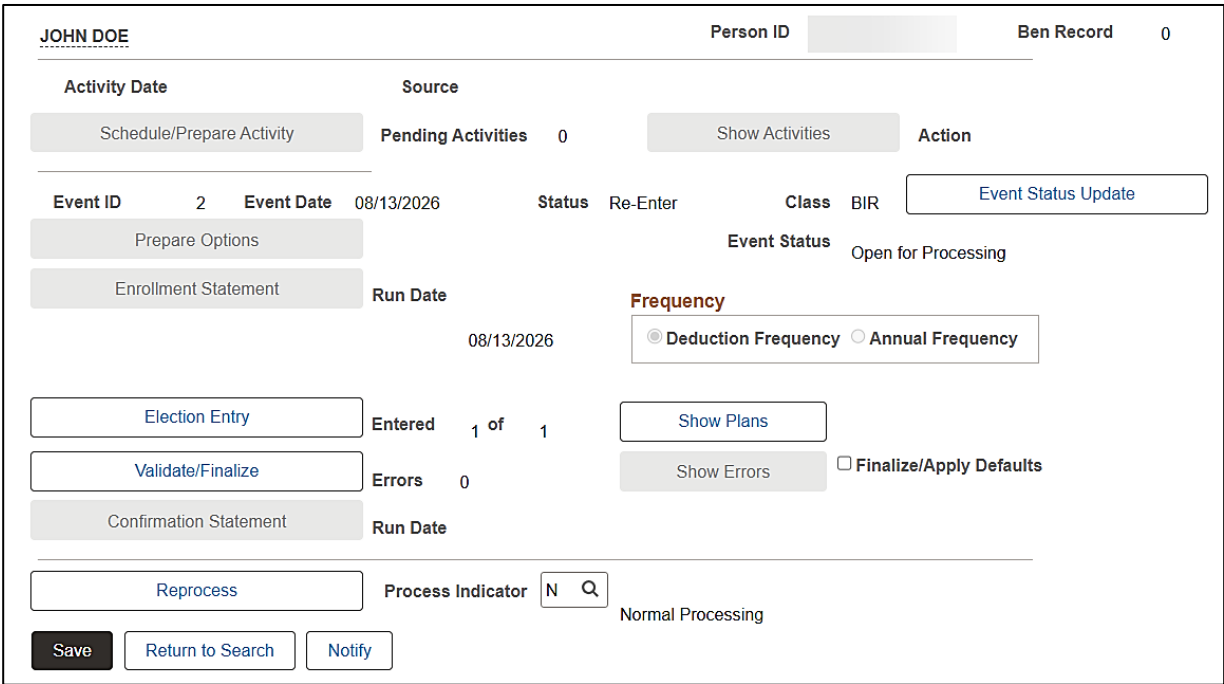
Re-Enter

Save

Return to Search

Notify



Step	Action
9.	Click the Reprocess button. 
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
10.	Click the OK button to close the message. 
	The On-Demand Event Maintenance page redisplay. 

Step	Action
	The Status field now displays “Re-Enter”. The Event Status field still displays as “Open for Processing”. The Process Indicator field now displays an “N” for Normal Processing. Notice that the Election Entry button is enabled. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 08/13/2026 Prepare Options Enrollment Statement Status Re-Enter Class BIR Event Status Update Event Status Open for Processing Election Entry Validate/Finalize Confirmation Statement Run Date 08/13/2026 Entered 1 of 1 Show Plans Errors 0 Show Errors ☐ Finalize/Apply Defaults Run Date Reprocess Save Return to Search Notify Process Indicator N Normal Processing

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

BenAdmin Data Entry x Help

Event / Participant Selection
Option Election
Dependents / Beneficiaries

Sched ID EM00 Empl ID JOHN DOE

Event Date 08/13/2026 Birth or Adoption

Ben Record 0 Event ID 2

Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options Q | 1 of 1

Plan Type 10 : Medical

Option Code 35 COVA Care + Expanded Dental (ACC2) (Self + Child)

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
01	Baby Doe	Child		☐	Child	☒

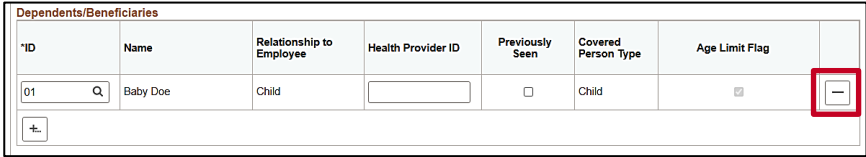
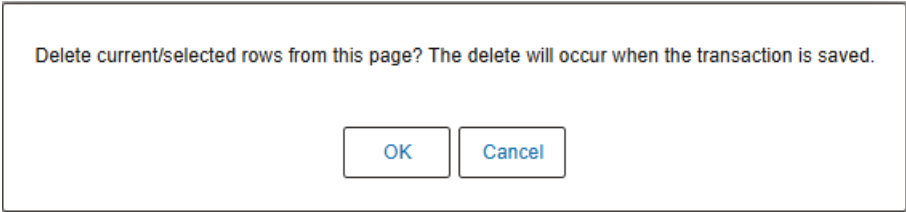
+

OK Cancel Apply

Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries



Step	Action
12.	Check the Option Code to see if the Coverage Level needs to be changed after removing the dependent(s) (e.g., “Family” to “Self & Spouse”, “Self & Spouse” to “Single”). 
13.	In the Dependents/Beneficiaries section, click the Delete button (-) to remove the dependent that was not approved. 
A Confirmation message displays to ensure you want to delete this dependent. 	
14.	Click the OK button to close the message. 
15.	Click the OK button at the bottom of the page. 



Benefits Job Aid

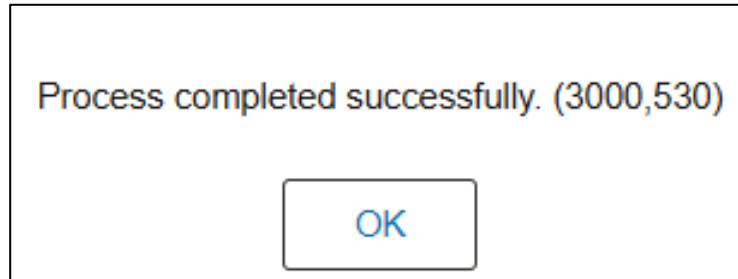
BN361 Managing and Approving Dependents

Step	Action
	The On-Demand Event Maintenance page redisplay. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 08/13/2026 Status Entered Class BIR 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 Notify

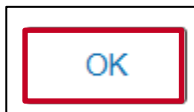


Step	Action
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A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



18.	Click the OK button.
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The **On-Demand Event Maintenance** page redisplay.

JOHN DOE Person ID Ben Record 0

Activity Date Source

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 08/13/2026 Status Finalized - Enrolled Class BIR Event Status Update

Prepare Options Event Status Closed to Processing

Enrollment Statement Run Date Frequency

08/13/2026 Deduction Frequency Annual Frequency

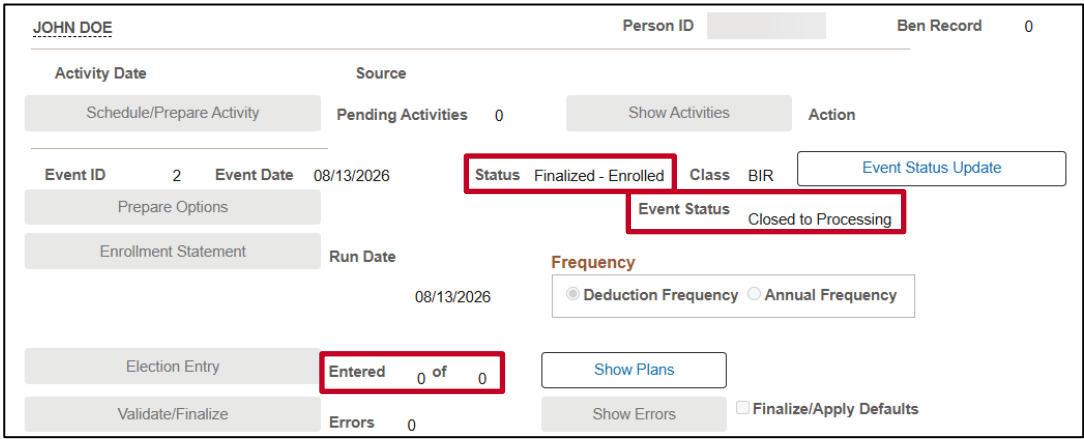
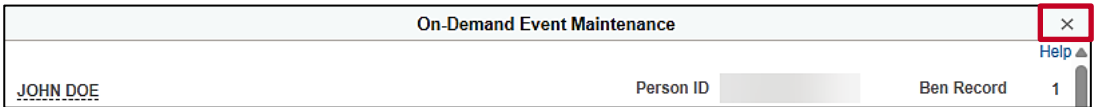
Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

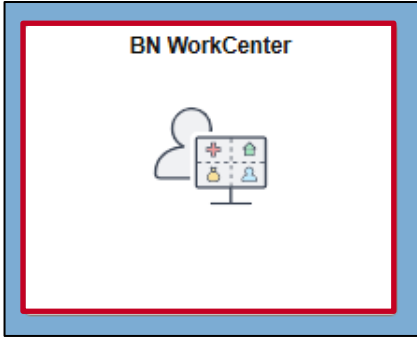
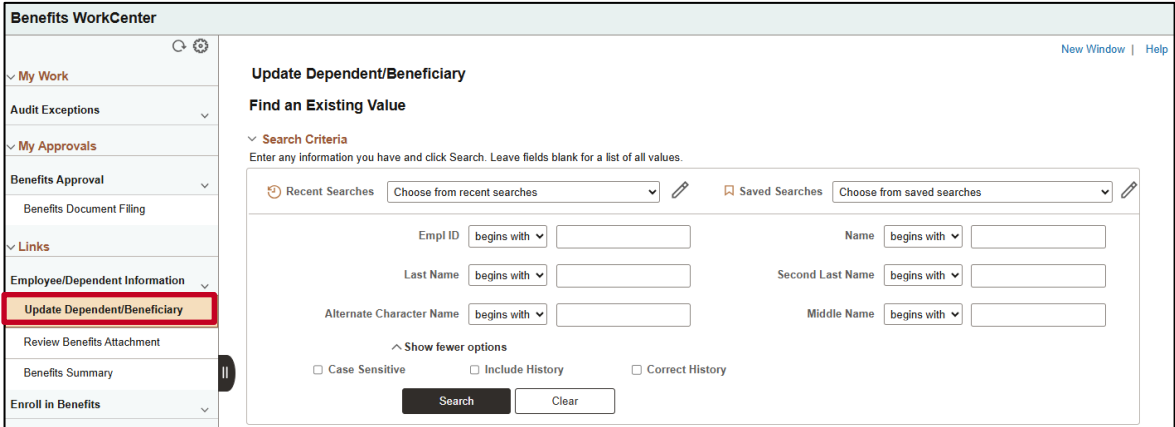
Step	Action
19.	Confirm that the Status field now displays as “Finalized-Enrolled” and the Event Status field is now “Closed to Processing”. Note: The number of elections entered will reset back to “0 of 0”. 
20.	Click the Close button (X) to close the window. 
21.	Refresh the list by clicking the Refresh button at the top of the Benefits WorkCenter. 
	The dependent is removed from the list and the count is reduced. Repeat the process as needed.

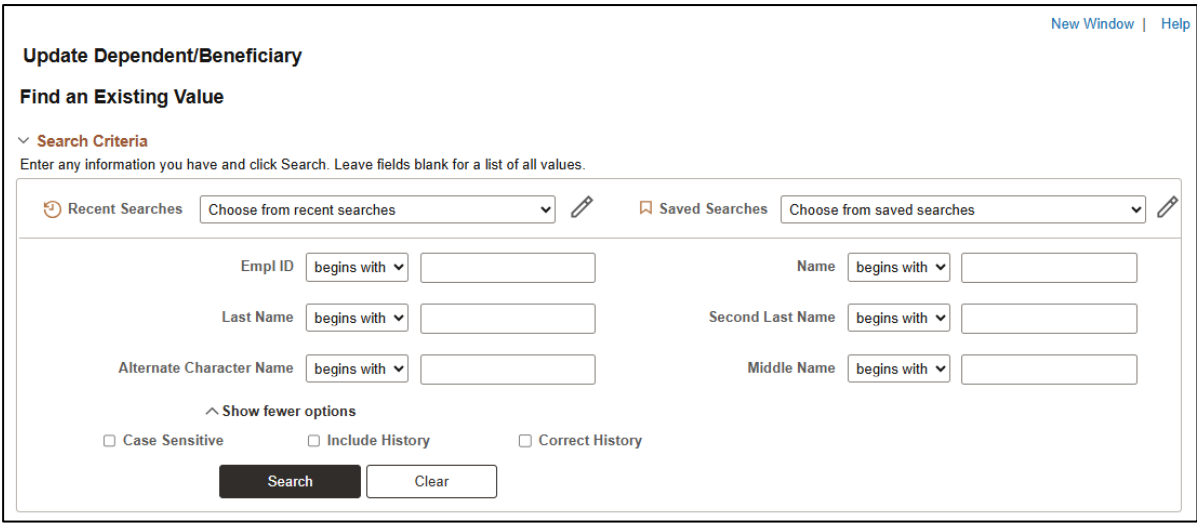
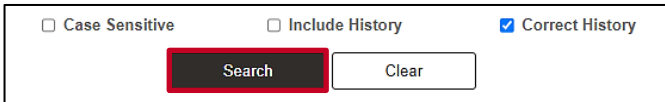
Managing Dependent Personal Information

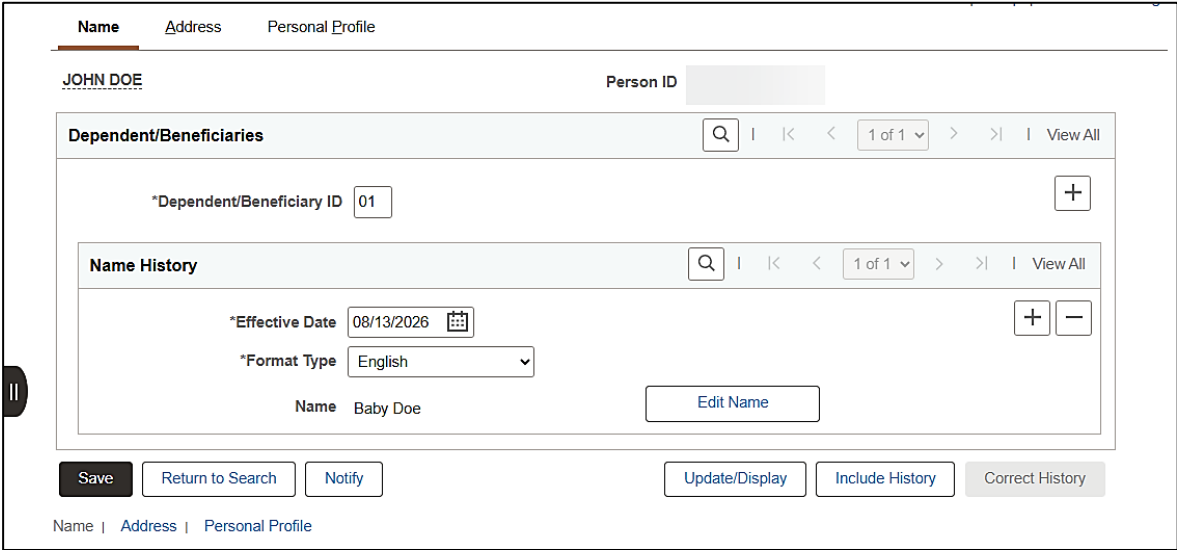
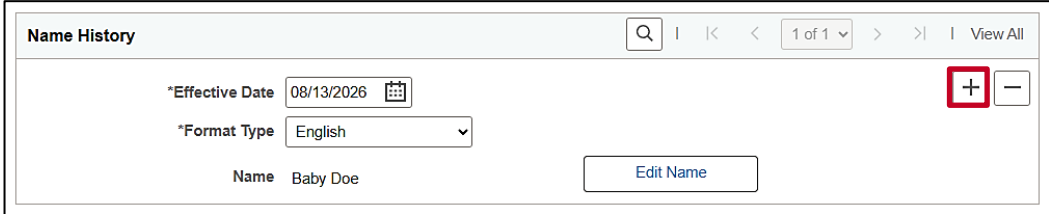
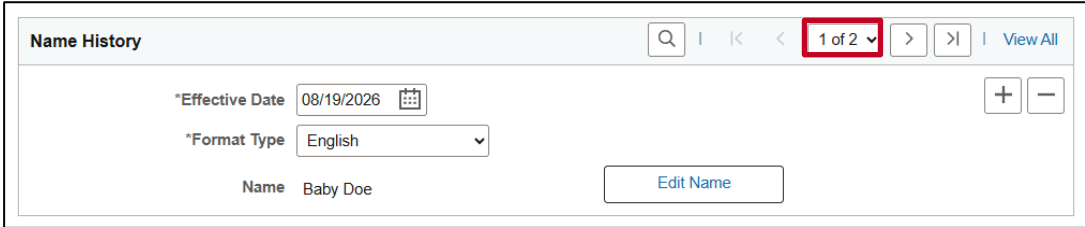
If a Benefit Event has been finalized and the dependent is enrolled, changes can be made by re-opening the Benefit Event and making the necessary changes. For more information on re-opening and reprocessing a Benefit Event, refer to the Job Aid titled **BN361 Re-opening and Reprocessing a Benefit Event**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**. Updates will be sent to the Vendors on the Daily Change file.

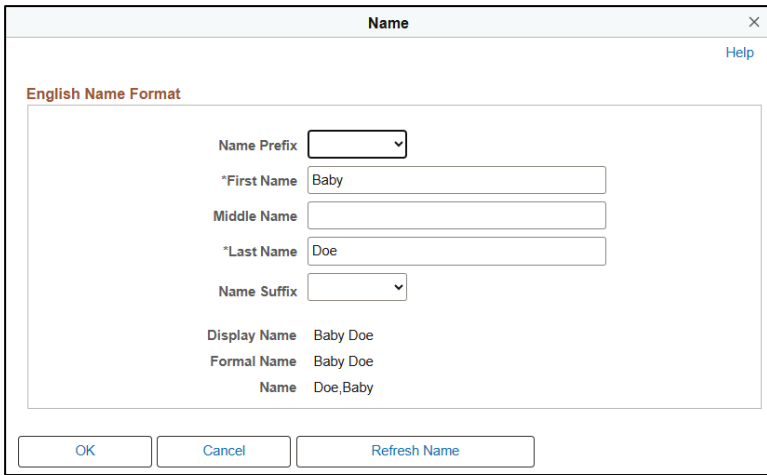
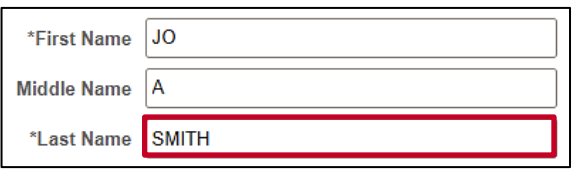
If no Benefit Event is available, changes must be made on the **Update Dependent/Beneficiary** page. All updates will be sent to the Vendors on the Monthly Reconciliation File which is sent on the first Monday of each month.

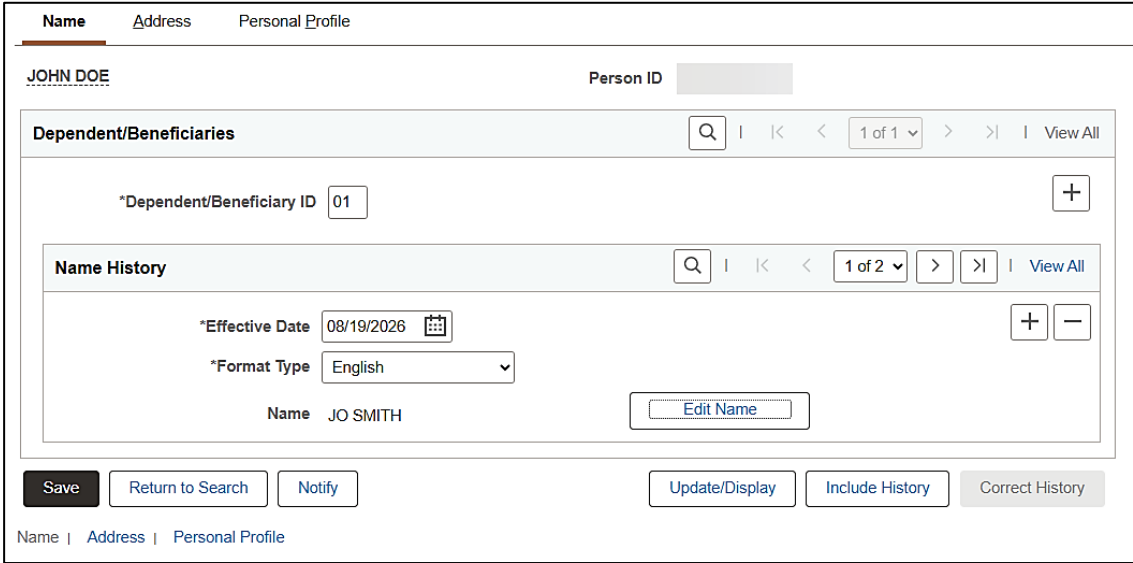
In this scenario, there is no Benefit Event available to make the changes.

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. 

Step	Action
	The Update Dependent/Beneficiary 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 located on the Cardinal website in Job Aids under Learning.
3.	Enter the 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. 
4.	Select the Correct History checkbox option. 
5.	Click the Search button. 

Step	Action
	The Update Dependent/Beneficiary page displays for the selected employee with the Name tab displayed by default. 
	As an example, the steps below outline the process for a name change.
6.	Click the Add a new row (+) icon in the Name History section to add a new effective dated row. 
	The Name History section redisplay with the new effective dated row. 
7.	The Effective Date defaults to today's date. Update the Effective Date field as needed. 

Step	Action
8.	Click Edit Name button. 
The Name page displays in a pop-up window. 	
9.	Update the Name fields as needed. For this example, “Smith” has been entered in the Last Name field as an update. 
10.	Click the OK button. 

Step	Action
	The Update Dependent/Beneficiary page redispays with the Display Name field updated in the Name History section.  The screenshot shows the 'Update Dependent/Beneficiary' page for 'JOHN DOE'. The 'Name' tab is selected. The 'Dependent/Beneficiaries' section shows a list with one entry: '*Dependent/Beneficiary ID' 01. Below this is the 'Name History' section, which shows a list with one entry: '*Effective Date' 08/19/2026, '*Format Type' English, and 'Name' JO SMITH. The 'Edit Name' button is visible next to the name. At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.
11.	Click the Save button.  The close-up shows the 'Save' button highlighted with a red border, along with the 'Return to Search' and 'Notify' buttons.