ORP Retiree Guide Overview

The purpose of this Job Aid is to provide the complete step-by-step process for the two most common ORP Retiree scenarios. These instructions include transactions completed both by a Human Resources (HR) Administrator and a Benefits (BN) Administrator. The two scenarios covered in this guide are:

- Scenario 1: Employee has Self + Spouse coverage. The employee retires and both the employee and spouse are under the age of 65.
- Scenario 2: Employee has Family coverage. The employee retires, is over 65, and the spouse is not. Hire the youngest dependent as an employee and enroll in benefits. **Note**: The same steps apply if the employee has Self + Spouse coverage and the employee is over age 65 and retires. Hire the under-65 spouse as an employee and enroll in benefits.

The HR Administrator and the BN Administrator will need to work together closely to complete these transactions.

Once the employee's retirement is effective and active employment with the Agency has been terminated, the Agency HR Administrator must change the **Email Option Selection** on the retiree's Personal Data record to "Employee Provided Email". This can be done earlier, only if the retiree will be using their time off (leave) until the date of their retirement. After the **Email Option Selection** is changed, the HR Administrator should notify the retiree that the Cardinal credentials have changed and that they will need to re-register in Okta with the personal email address that they provided. If the **Email Option Selection** is changed too early, the retiree will lose access to Cardinal. This could potentially impact their ability to fulfill their responsibilities to the Agency, and they will need to re-register through OKTA using their personal email address.

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.

Navigation Note: Please note that you may see 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

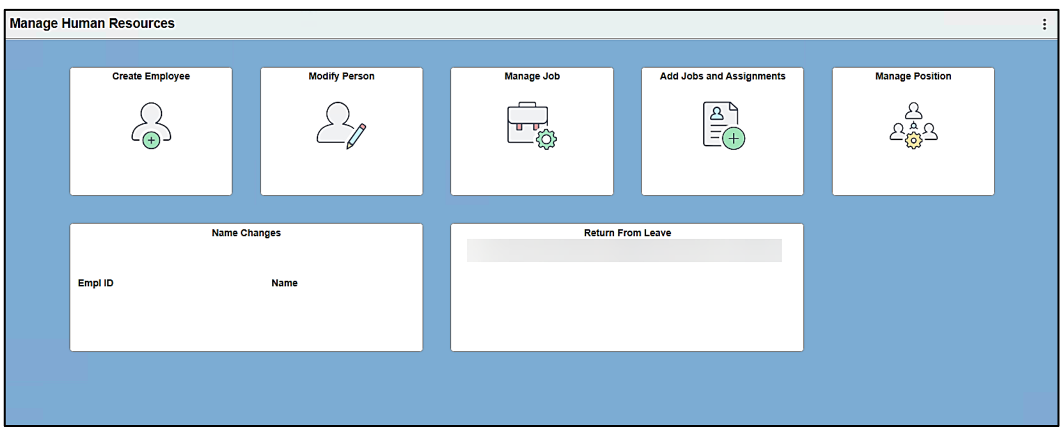
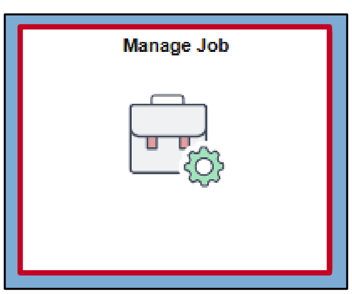
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
7/15/2026	Notes added pertaining specifically to retirees declining medical coverage permanently, including updates to Eligibility Field 5, no Election Entry, and no updates to the **Benefits Personal Data** page.
3/23/2026	Baseline.

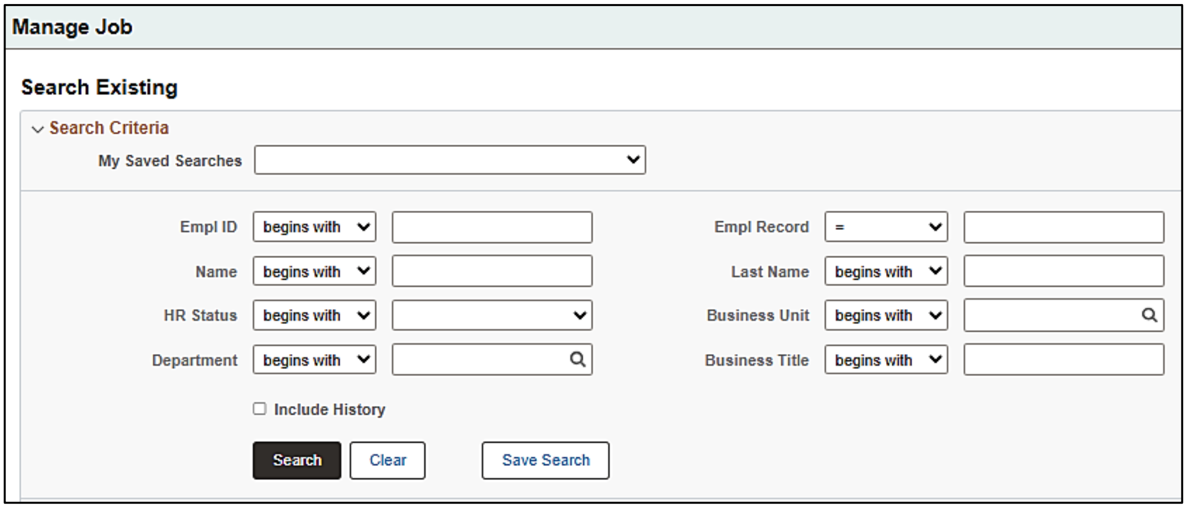
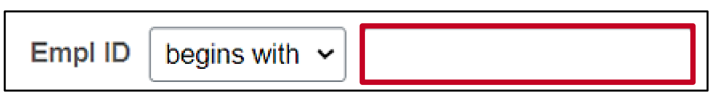
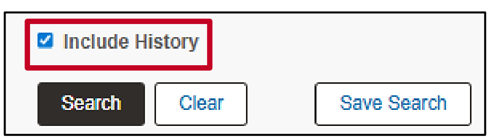
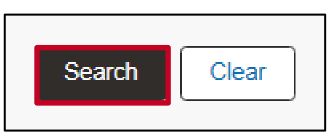
Scenario 1 – Employee Retires (under 65) with Self + Spouse Coverage

Employee has “Self + Spouse” coverage. The employee retires and both the employee and spouse are under the age of 65.

Retirement Process

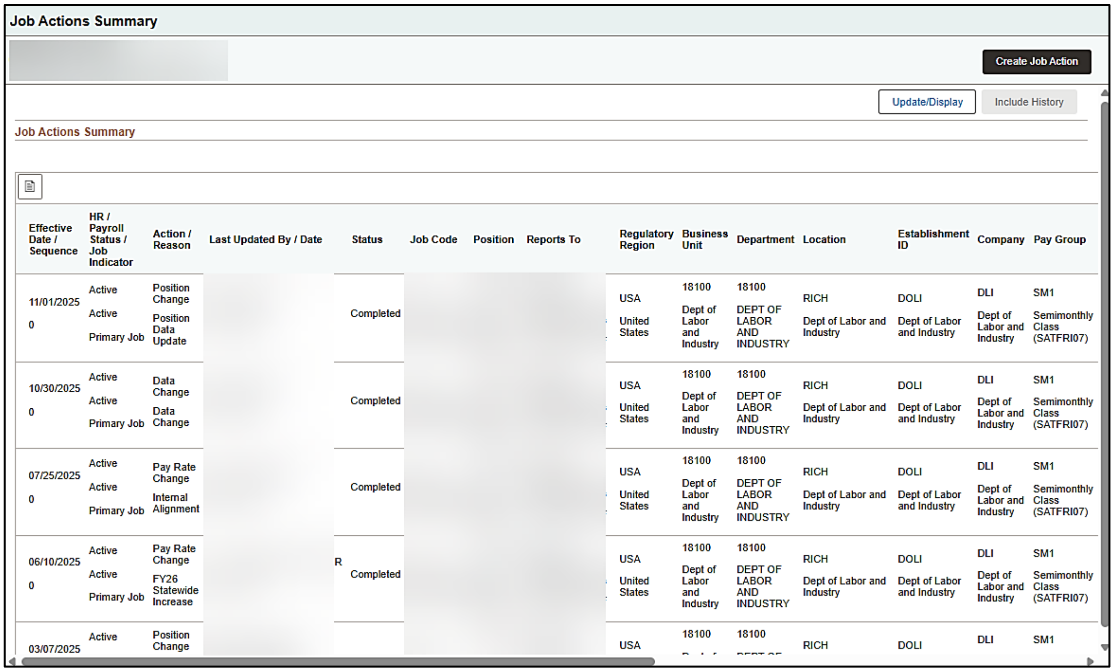
First, the employee must be retired. This transaction is completed by an HR Administrator.

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

Step	Action
	The **Manage Job 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 employee's Employee ID in the **Empl ID** field. **Note**: Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 
4.	Select the **Include History** checkbox option. 
5.	Click the **Search** button. 

Step	Action

The **Job Actions Summary** page displays for the selected employee.

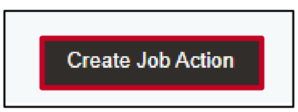

Job Actions Summary

Create Job Action

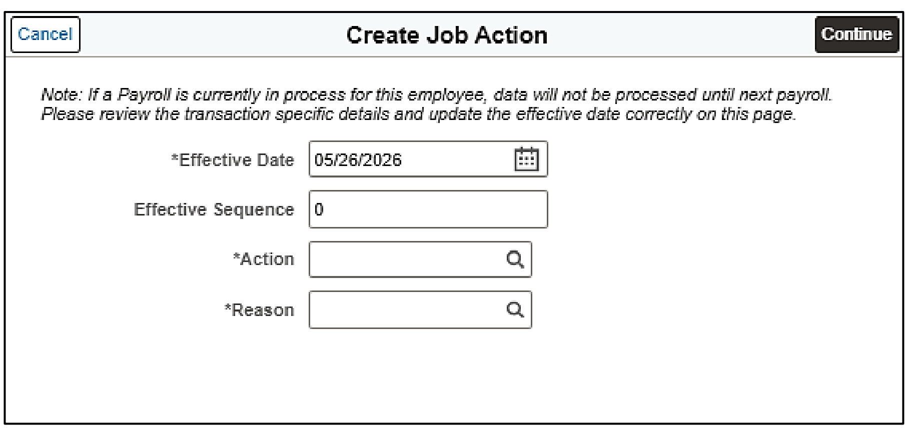
Update/Display | Include History

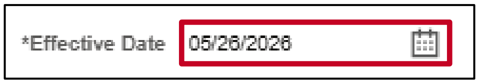
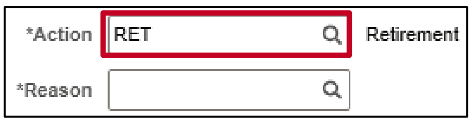
Job Actions Summary

Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group
11/01/2025 0	Active Active Primary Job	Position Change Position Data Update		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)
10/30/2025 0	Active Active Primary Job	Data Change Data Change		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)
07/25/2025 0	Active Active Primary Job	Pay Rate Change Internal Alignment		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)
06/10/2025 0	Active Active Primary Job	Pay Rate Change FY26 Statewide Increase	R	Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)
03/07/2025	Active	Position Change						USA	18100	18100	RICH	DOLI	DLI	SM1

ℹ	If the **Include History** checkbox option was not selected, only the current row of data will display.
6.	Click the **Create Job Action** button to add a new effective dated row. 

The **Create Job Action** page displays in a pop-up window.

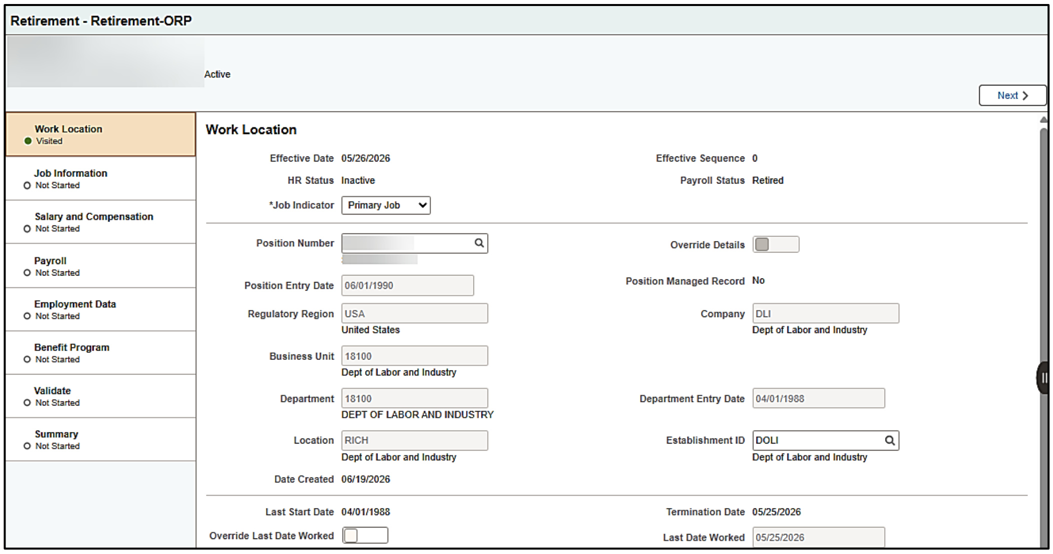


Step	Action
7.	Update the effective date as needed using the **Effective Date Calendar** icon. 
	Set the effective date to be one day after the employee's last day worked. The effective date of Termination transactions is generally the day immediately following the last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "5/25/2026", the effective date of the termination should be "5/26/2026". 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**.
8.	Click the **Action** field dropdown button and select "RET" (Retirement). 
9.	Click the **Reason** field dropdown button and select the applicable reason ("ORP" has been selected for this example). 
	For further information on Action Reasons, see the Job Aid titled **HR351 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
10.	Click the **Continue** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

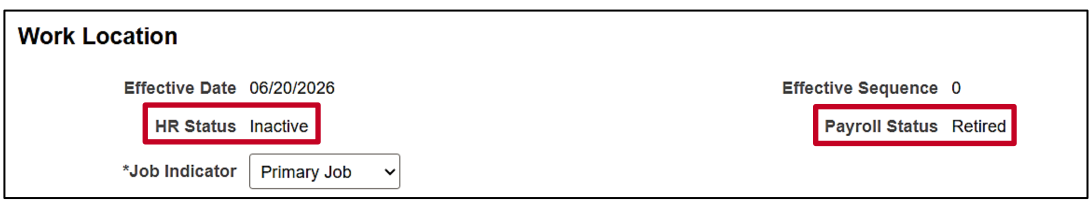
The **Work Location** page displays.

Note: After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update.



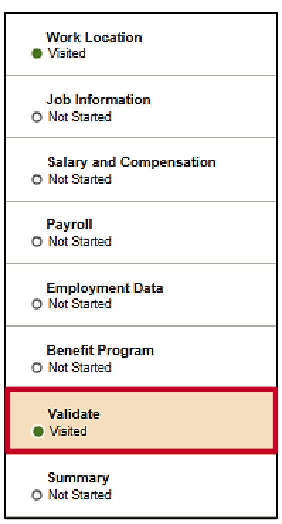
</td></tr>
<tr><td>11.</td><td>

Validate that the **HR Status** displays as “Inactive” and the **Payroll Status** displays as “Retired”.



</td></tr>
<tr><td>12.</td><td>

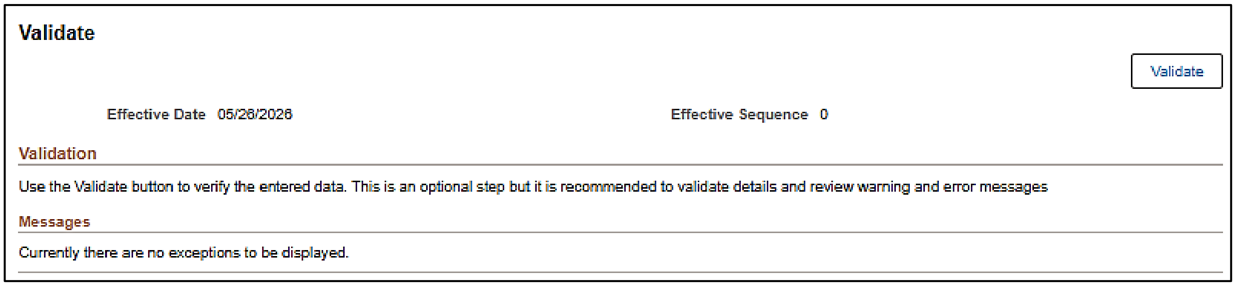
Click the **Validate** tab.



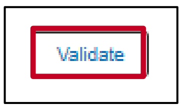
</td></tr>
</table>

Step	Action

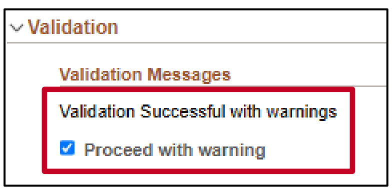
The **Validate** page displays.



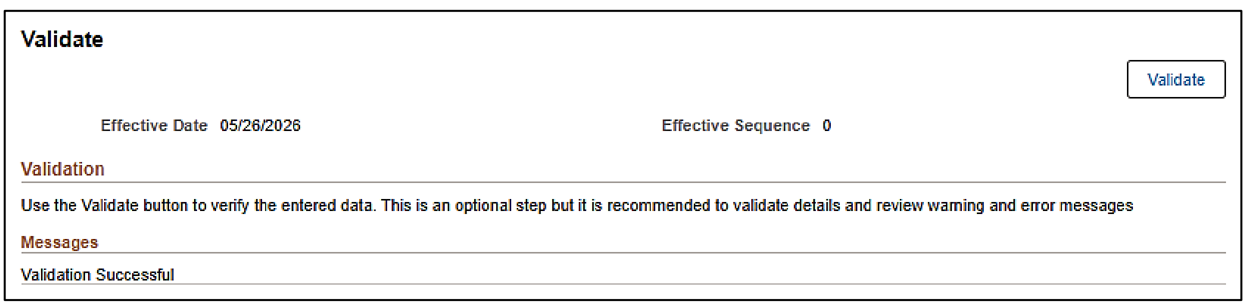
13. Review the **Validate** page and click the **Validate** button.

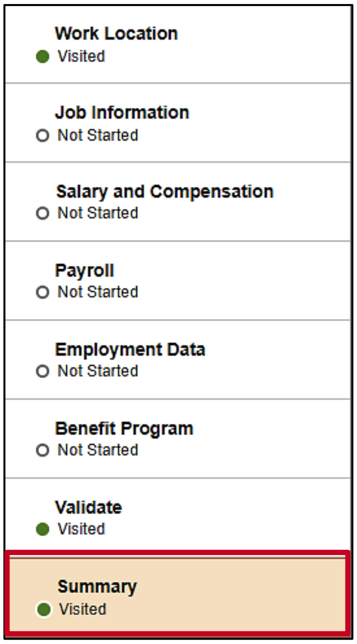


Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the **Proceed with warning** checkbox option if applicable.

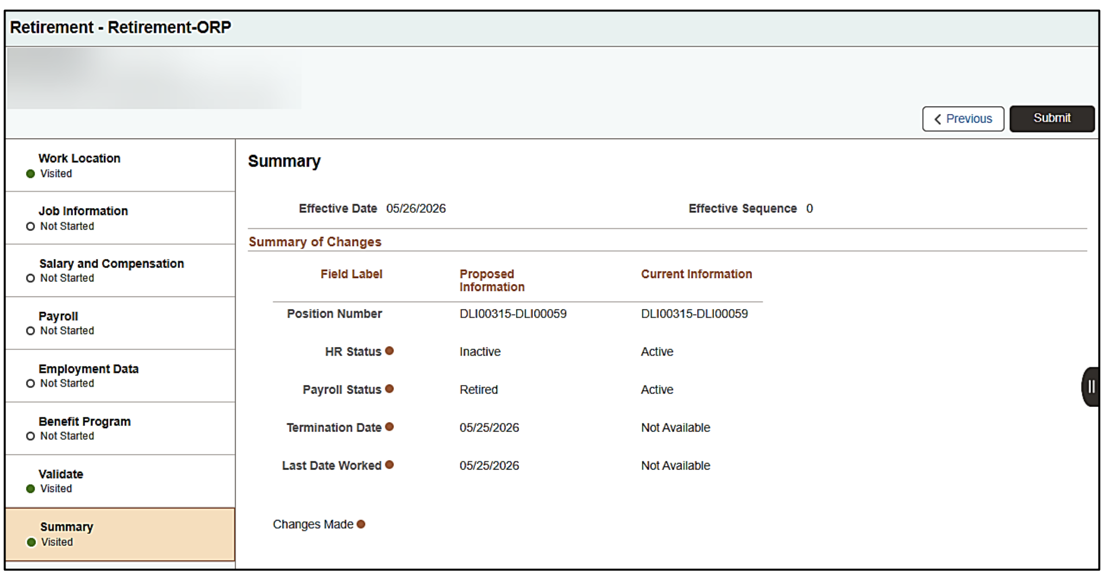


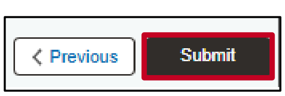
The **Validate** page refreshes.

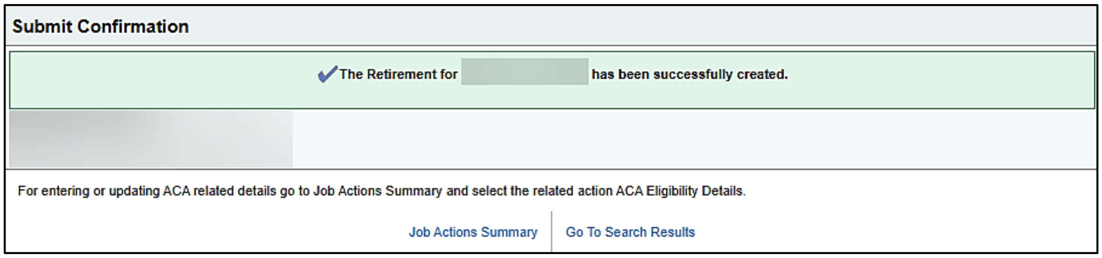


Step	Action
14.	After validation, click the **Summary** tab. 

The **Summary** page displays.

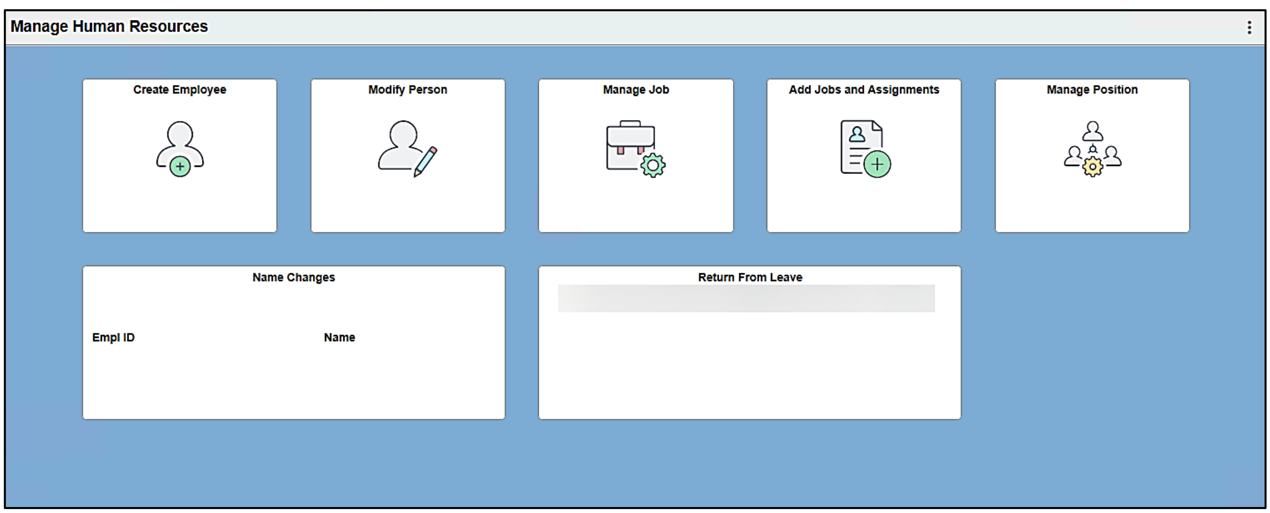
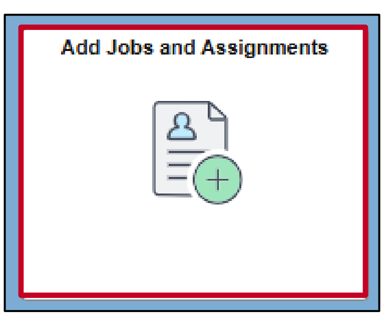


Step	Action
15.	Review the **Summary of Changes** section and click the **Submit** button. 

Step	Action
	The **Submit Confirmation** page displays confirming the change. 
	Now the Agency HR Administrator should hire the employee into the ORP retirement position using a new employment instance.
16.	Click the **Home** button to navigate back to the **Cardinal HCM Homepage**. 

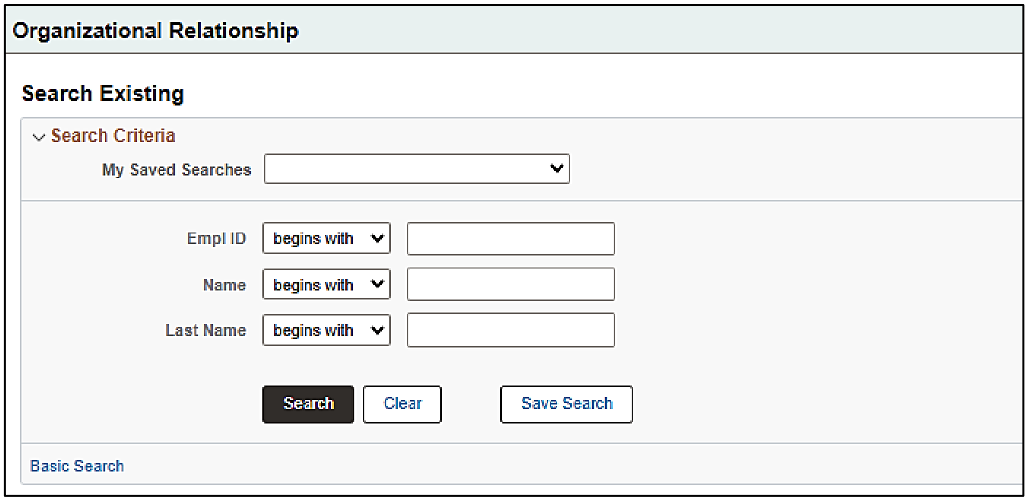
ORP Retiree New Hire

Next, the retiree is hired into the ORP Retirement position using a new employment instance. This transaction is completed by an HR Administrator.

Step	Action
1.	Navigate to the **Add Employee Relationship** page by clicking the **Manage Human Resources** tile on the **Cardinal HCM Homepage**. 
The **Manage Human Resources** page displays.  	
2.	Click the **Add Jobs and Assignments** tile. 

Step	Action

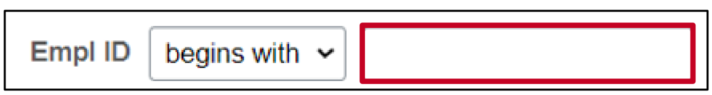
The **Organizational Relationships Search Existing** page displays.



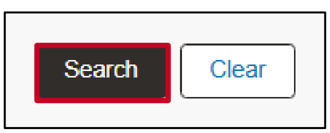
For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

3. Enter the employee's Employee ID in the **Empl ID** field.

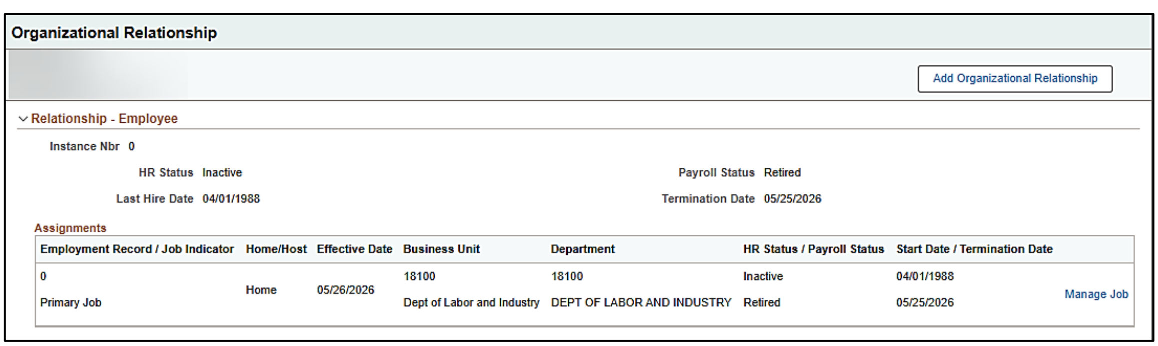
Note: Users can also search for the applicable employee using the various fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

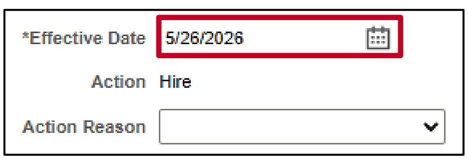
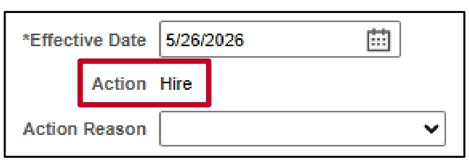


4. Click the **Search** button.



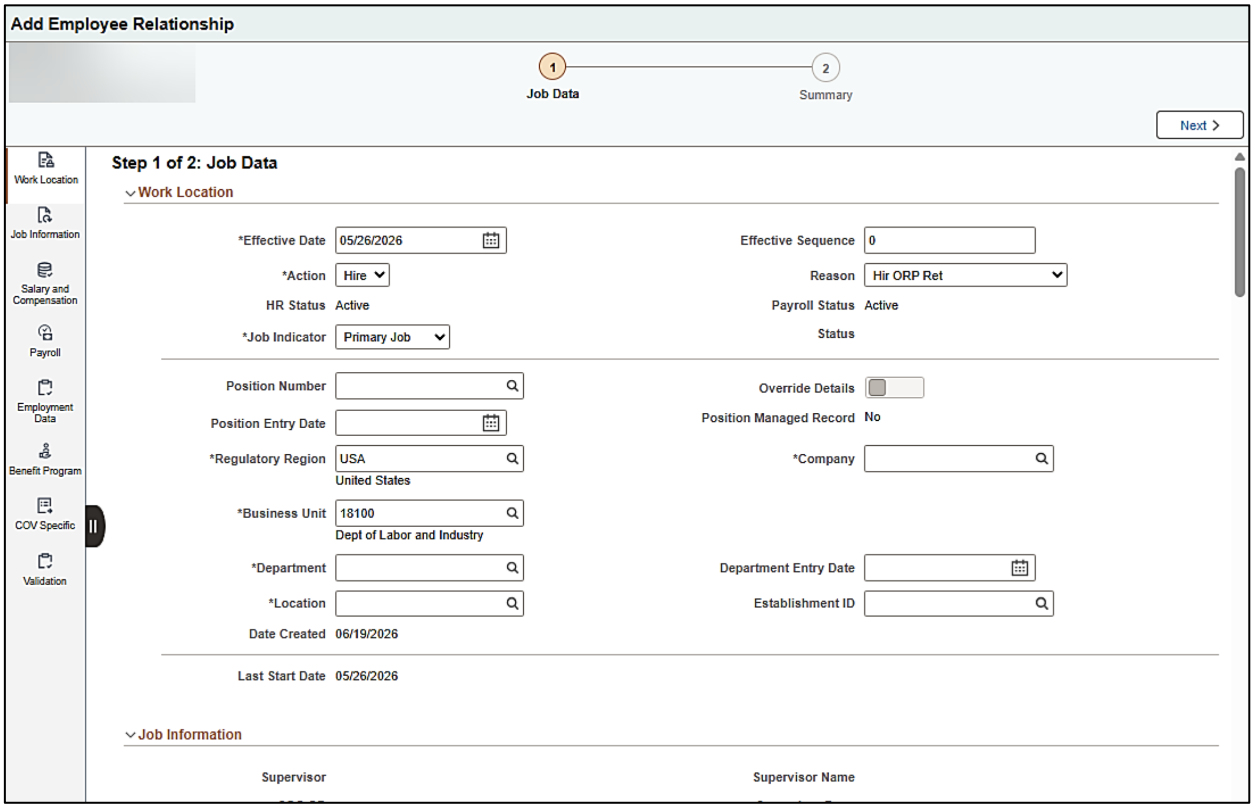
The **Organizational Relationship** page displays for the applicable employee.



Step	Action
5.	Click the **Add Organizational Relationship** button. 
	The **Add Organizational Relationship** page displays in a pop-up window. 
6.	The **Effective Date** field defaults to the current system date. Click the **Calendar** icon to change the effective date to be the same date as the retirement action previously completed by the HR Administrator in the Retirement Process section of this Job Aid, or the first of the month following the termination date. 
7.	The **Action** field defaults to “Hire” and cannot be changed. 
8.	Click the **Action Reason** dropdown button and select “Hir ORP Ret”. 
	For further information on Action Reasons, see the Job Aid titled **HR351 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9.</td><td>Click the Continue button.

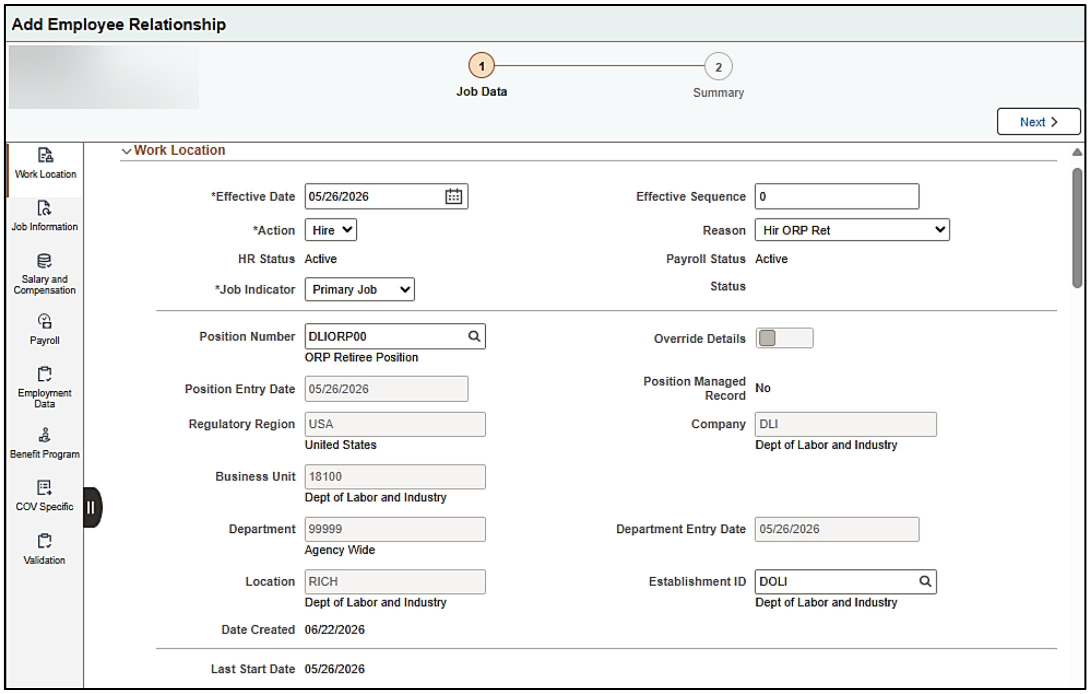
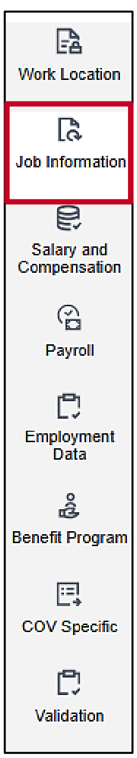
</td></tr>
<tr><td colspan="2">The Add Employee Relationship page displays, Step 1 of 2: Job Data, with the Work Location section displayed by default.

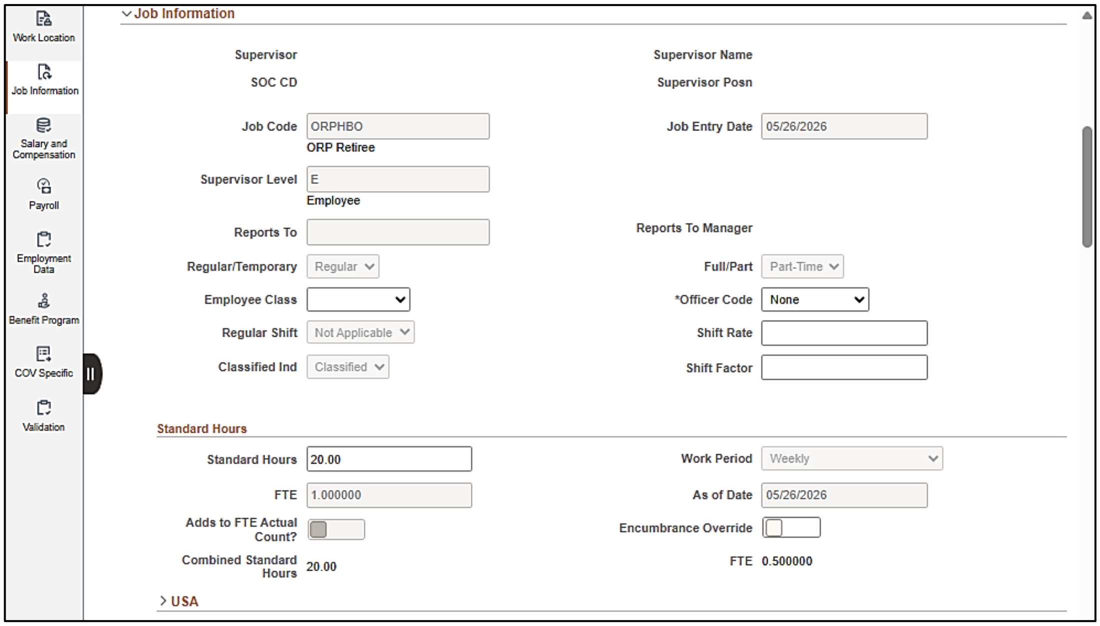


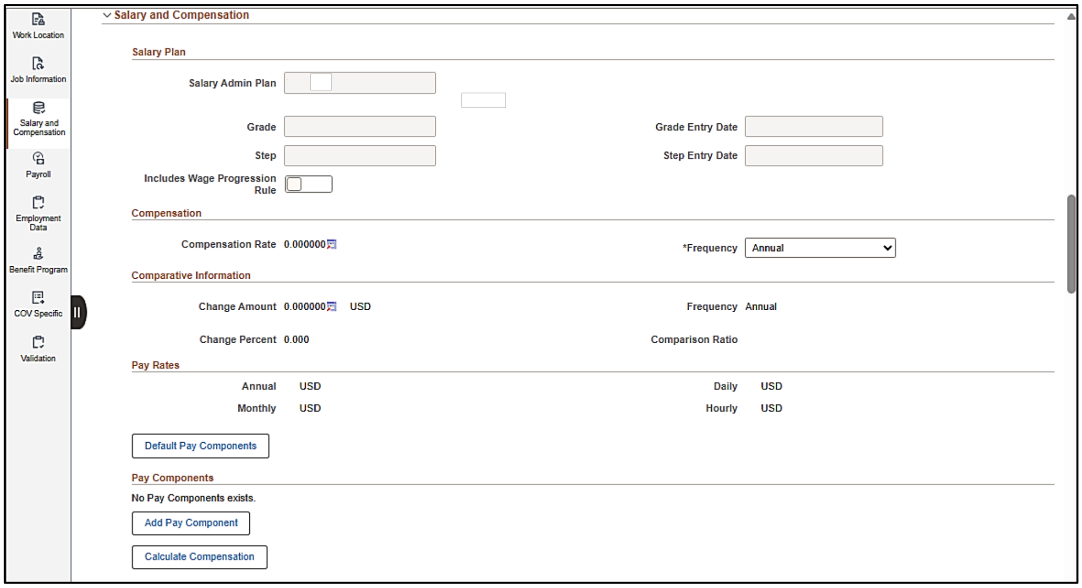
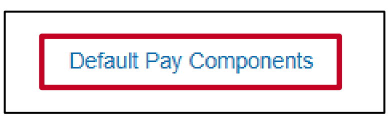
</td></tr>
<tr><td>10.</td><td>Enter the Agency’s ORP Retiree Position Number in the Position Number field.

Note: The Position Number is the Company Code + “ORP” + “00”. For example, “DLIORP00”.

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

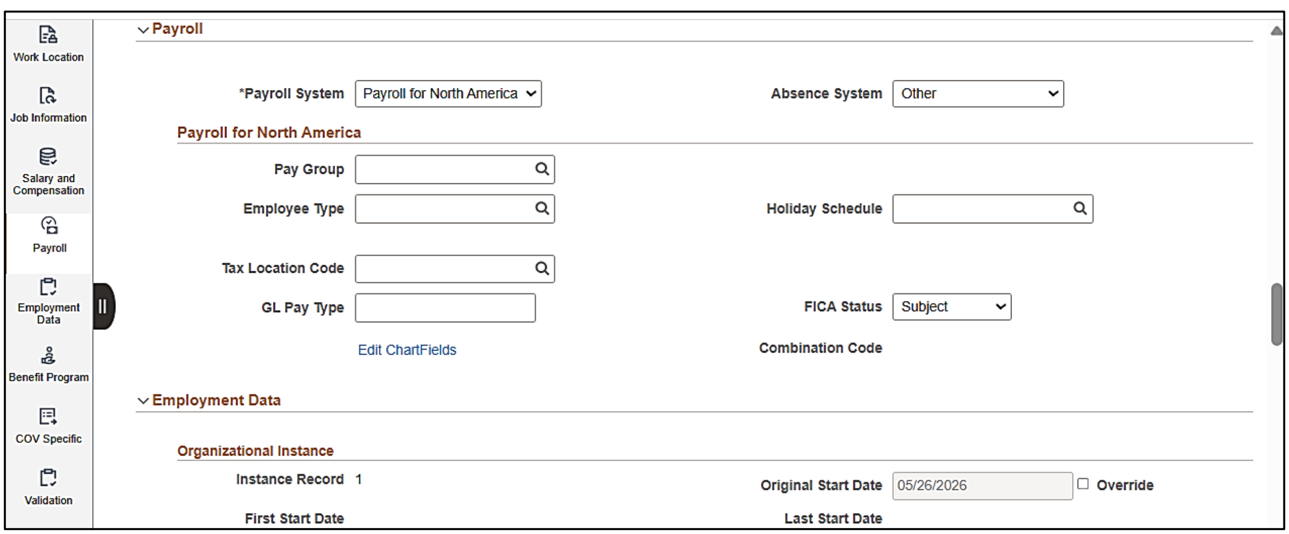
Step	Action
The **Work Location** page refreshes and the position-related information auto-populates. 	
11.	Click the **Job Information** tab. 

Step	Action
	The **Job Information** section displays. 
12.	Click the **Employee Class** dropdown button and select "ORPRetiree". 
13.	Click the **Salary and Compensation** tab. 

Step	Action
	The **Salary and Compensation** section displays. 
14.	Click the **Frequency Look up** icon and change the selection from “Annual” to “Monthly”. 
15.	Click the **Defaults Pay Components** button. 
16.	Click the **Calculate Compensation** button. **Note:** No additional Pay Components fields should be entered. 

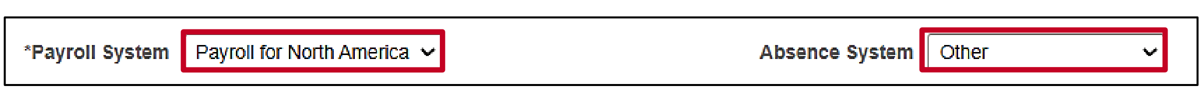
Step	Action
17.	Click the **Payroll** tab.

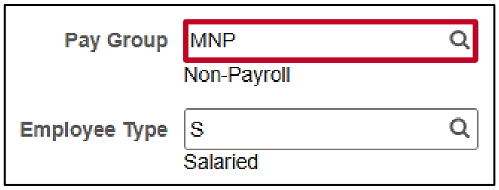
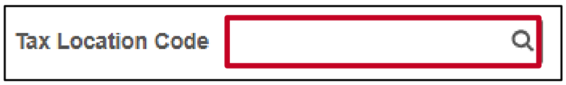
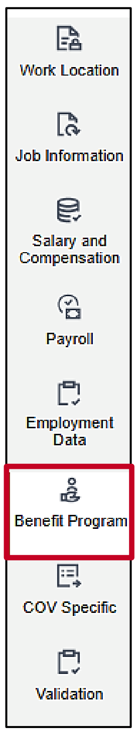
The **Payroll** section displays.



The **Payroll System** field defaults to “Payroll for North America”. Do not change.

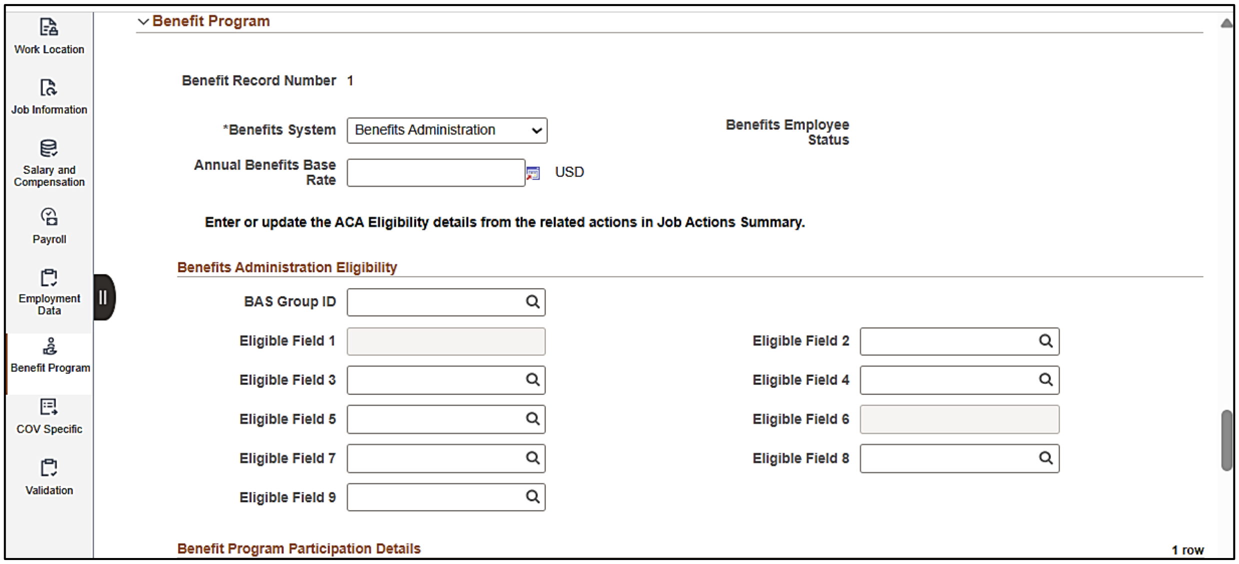
The **Absence System** field defaults to “Other”. Do not change.



Step	Action
18.	Click the **Pay Group Look up** icon and select “MNP”. **Note**: This is the Non-Payroll pay group. Once selected, the **Employee Type** field will default to “S” (Salaried). 
19.	Enter the applicable Tax Location Code in the **Tax Location Code** field. 
20.	Click the **Benefit Program** tab. 

Step	Action

The **Benefit Program** section displays.

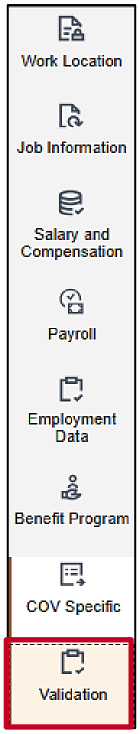
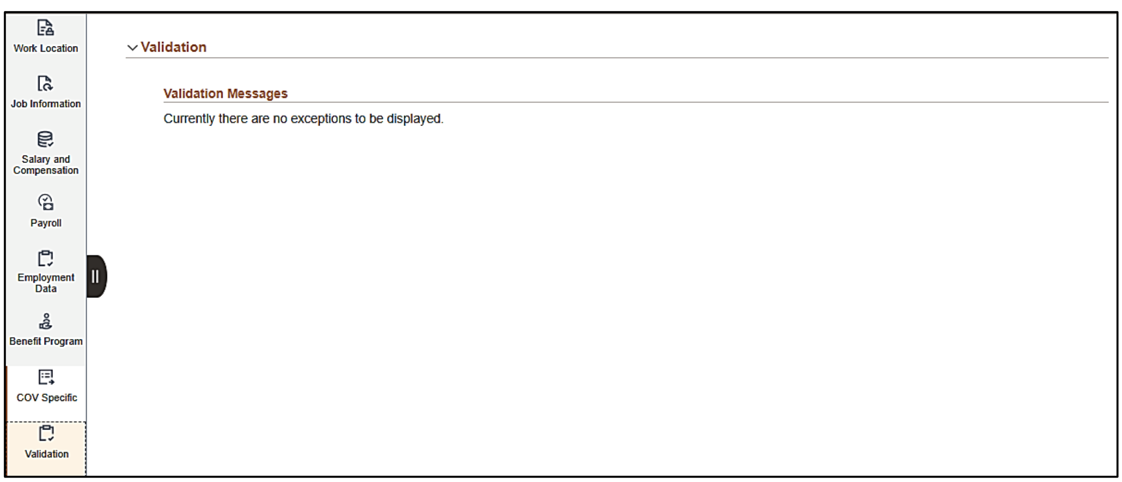


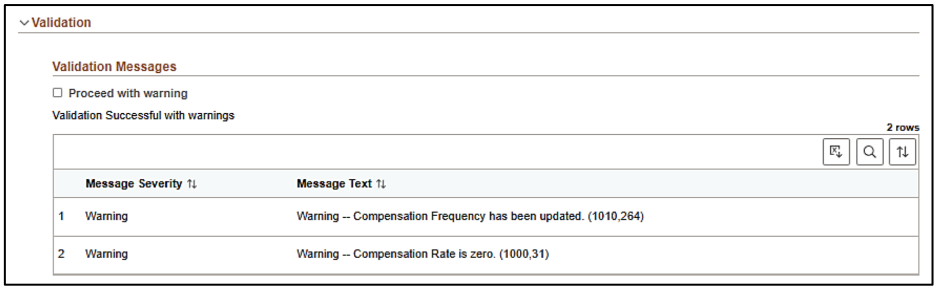
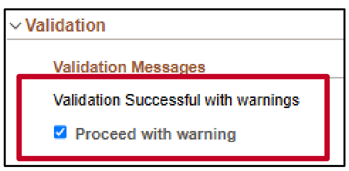
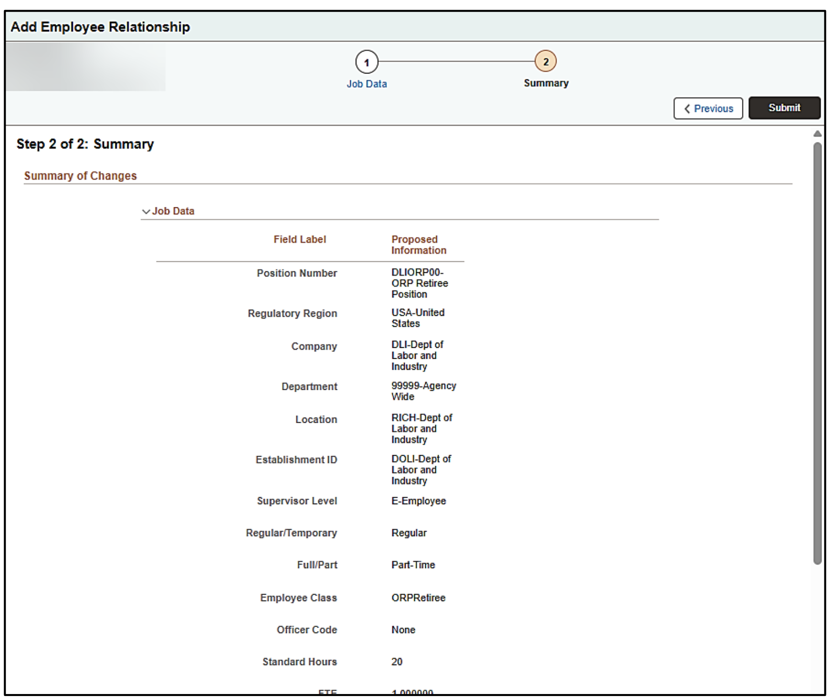
21. Complete the **Benefits Administration Eligibility Fields 2**, **3**, **8**, and **9** based on the appropriate scenarios for the ORP Retiree:

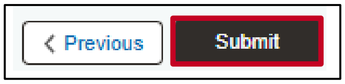
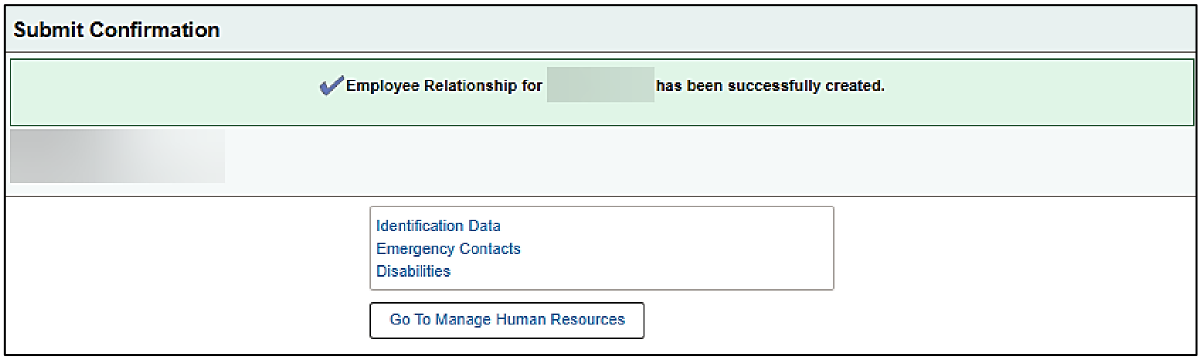
- **Field 2** – “007008000” is the ORP Retiree Value
- **Field 3** – “N”
- **Field 8** – select the applicable value (“12-12” in this example)
- **Field 9** – select the applicable value (“RR-GB” in this example)

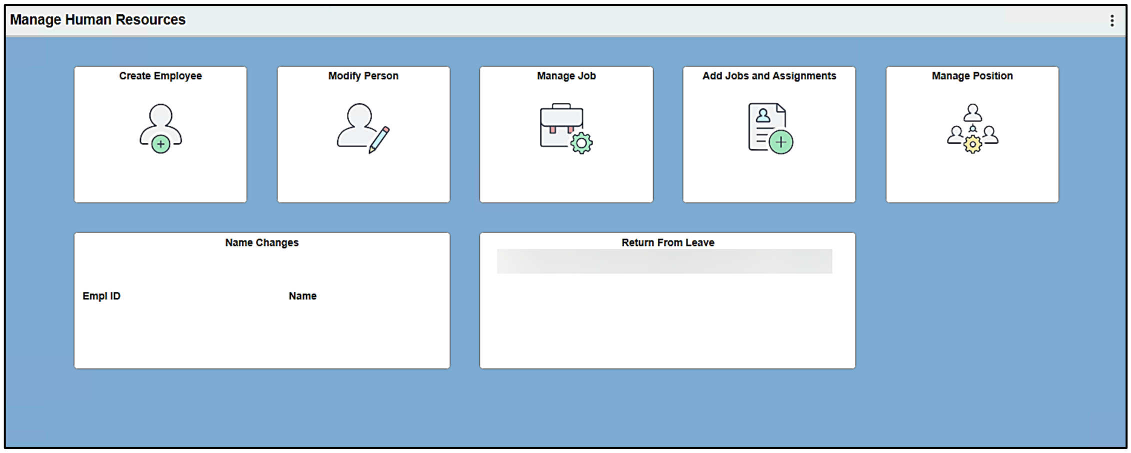
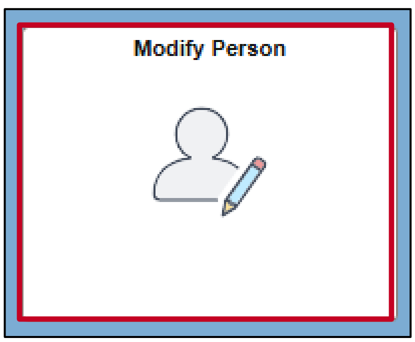
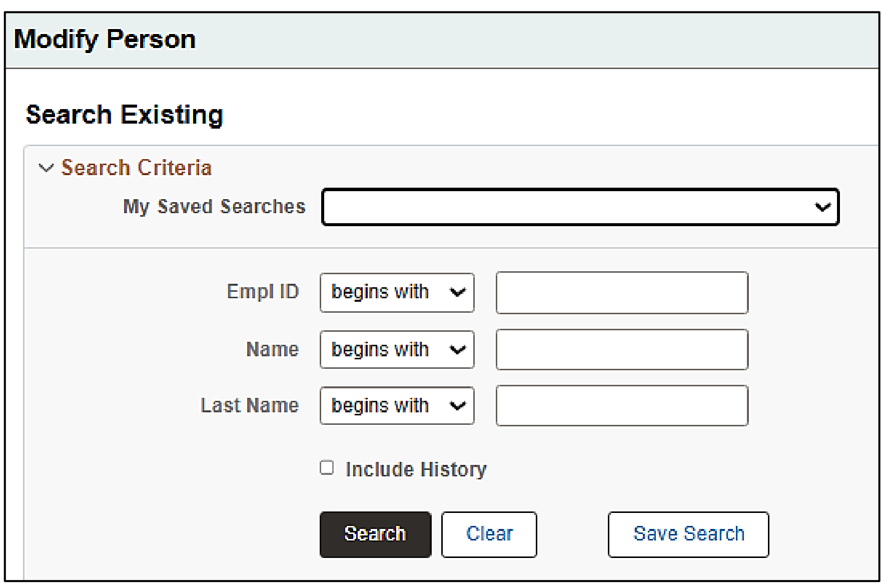
Note: If the retiree is selecting to decline medical coverage permanently, users must click **Eligible Field 5** and select “TERM-RET”.

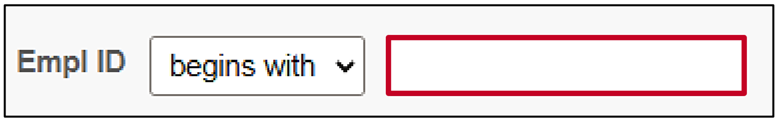
For further information on Eligibility Fields, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
22.	Click the **Validation** tab. 
The **Validation** section displays. 	
23.	Click the **Next** button. 

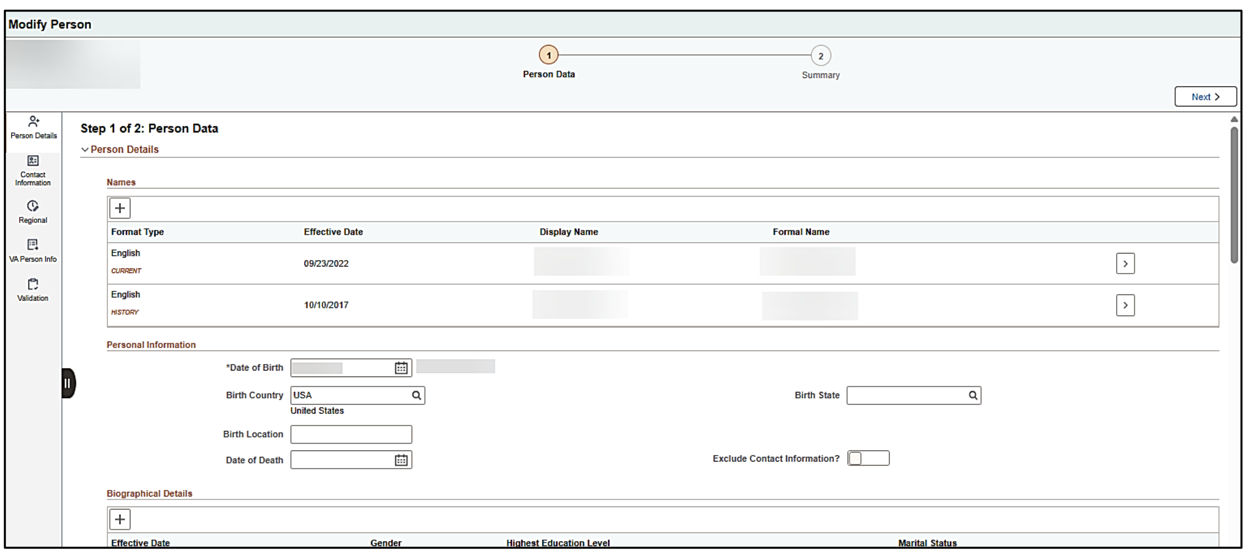
Step	Action
	The **Validation** section redisplays. 
24.	Review the Validation messages and click the **Next** button.  **Note**: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the **Proceed with warning** checkbox option if applicable. 
	The **Add Employee Relationship Step 2 of 2: Summary** page displays. 

Step	Action
25.	Review the **Summary of Changes** section and click the **Submit** button. 
	The **Submit Confirmation** page displays. 
26.	Run the **Employee Activity Report** for the employee using the following navigation path: **NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report**
27	Print the report and place the printed transaction in the employee file for future audit requests. **Note**: For additional information on the **Employee Activity Report** and the steps used to run this report, refer to the **Cardinal HCM Human Resources Reports Catalog**. The **Cardinal HCM Human Resources Reports Catalog** can be found on the Cardinal website under **Resources**.
28.	Next, the retiree's email address must be updated to the personal email address. Starting from the **Cardinal HCM Homepage**, click the **Manage Human Resources** tile. 

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

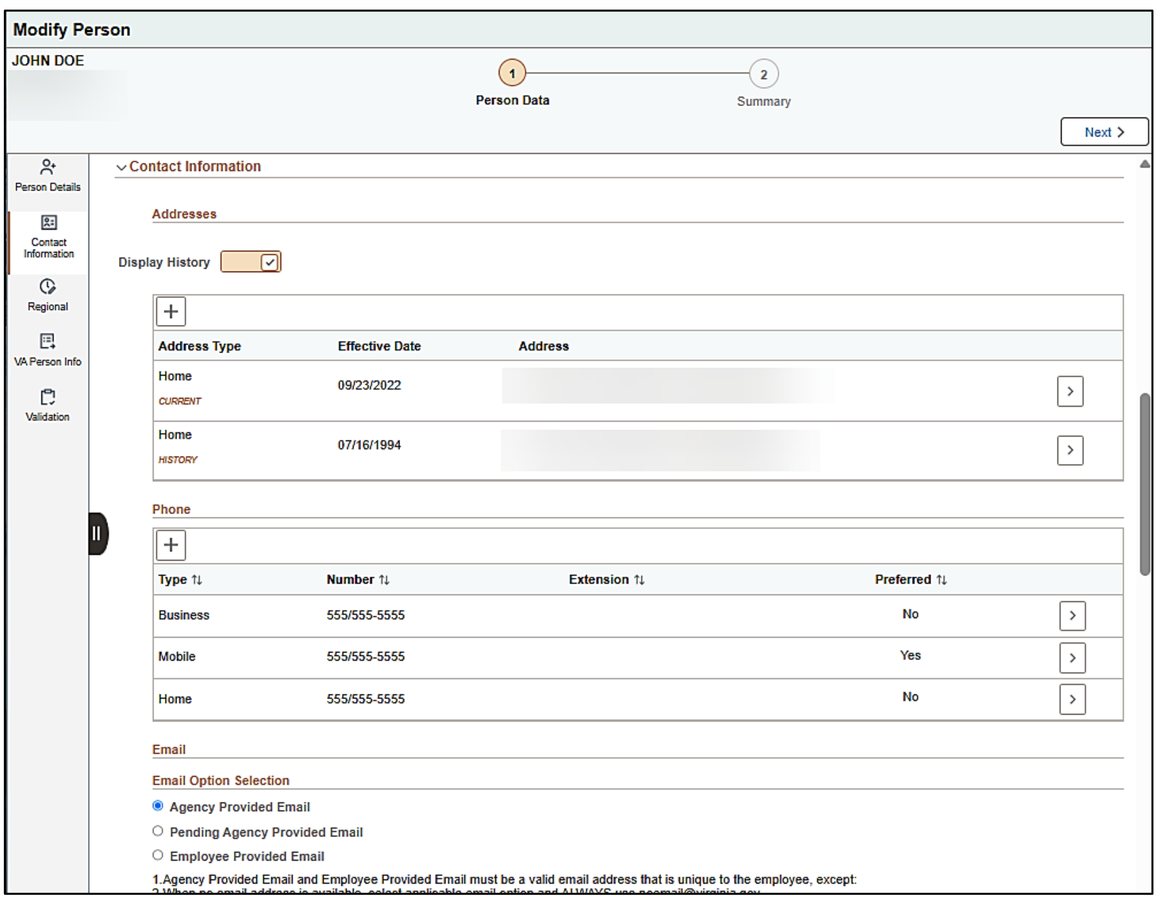
Step	Action
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
30.	Enter the employee's Employee ID in the **Empl ID** field. **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. 
31.	Select the **Include History** checkbox option. 
32.	Click the **Search** button. 

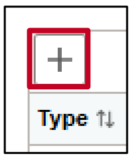
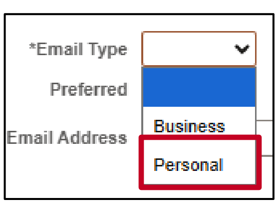
The **Modify Person** page, **Step 1 of 2: Person Data**, with the **Person Details** tab displayed by default.

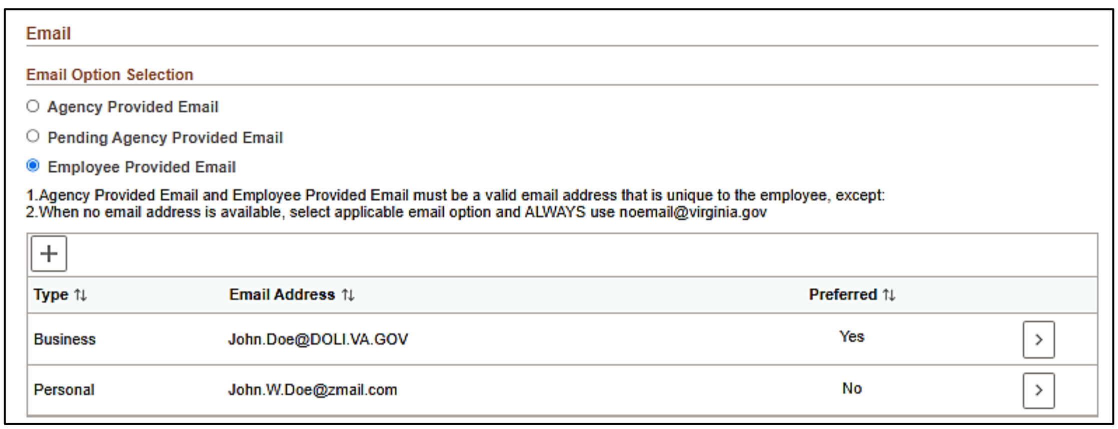
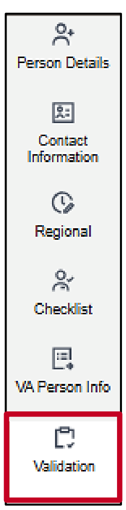


Step	Action
33.	Click the **Contact Information** tab. 

The **Contact Information** section displays.

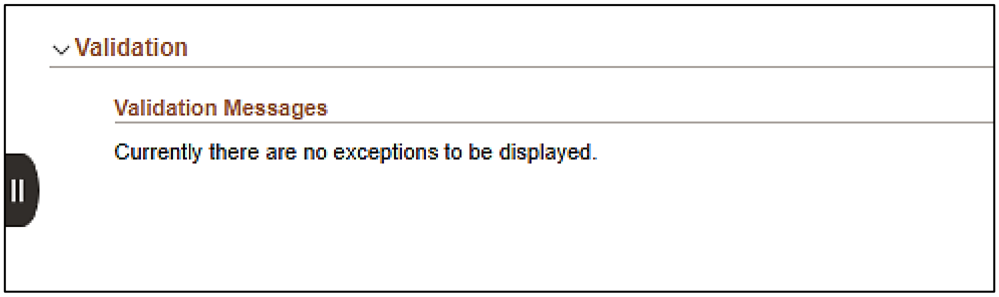


Step	Action
34.	Select the **Employee Provided Email** radio button in the **Email Option Selection** section. 
	Selecting the “Employee Provided Email” radio button option will update the **Preferred** email address to the “Personal” email address once submitted. Additionally, the “Agency Provided Email” will automatically be removed.
35.	If no personal email address type exists for the retiree, click the **Add Email** icon (**+**). 
	If a personal email address exists, click the **Edit** icon (**>**) at the end of the personal email address row to confirm or update the retiree’s personal email address as needed.
	The **Email Address** page displays in a pop-up window. 
36.	Click the **Email Type** dropdown button and select the “Personal” option. 

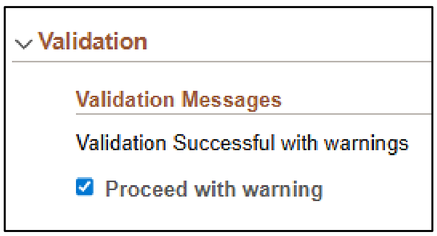
Step	Action
37.	Enter the email address in the **Email Address** field. 
38.	Click the **Done** button. 
The **Email** section redisplays.  	
39.	Click the **Validation** tab. 

Step	Action

The **Validation** section displays.

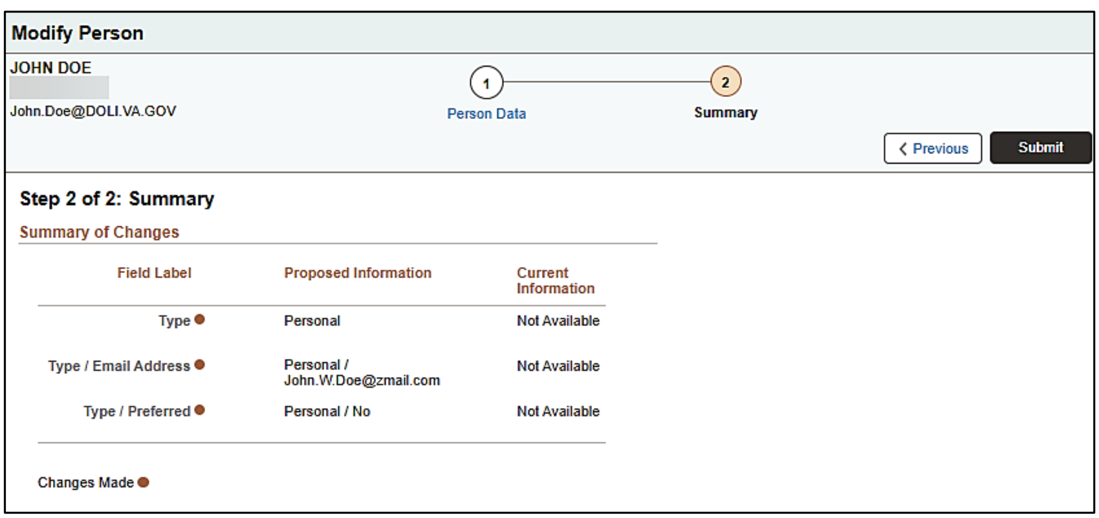


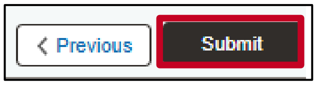
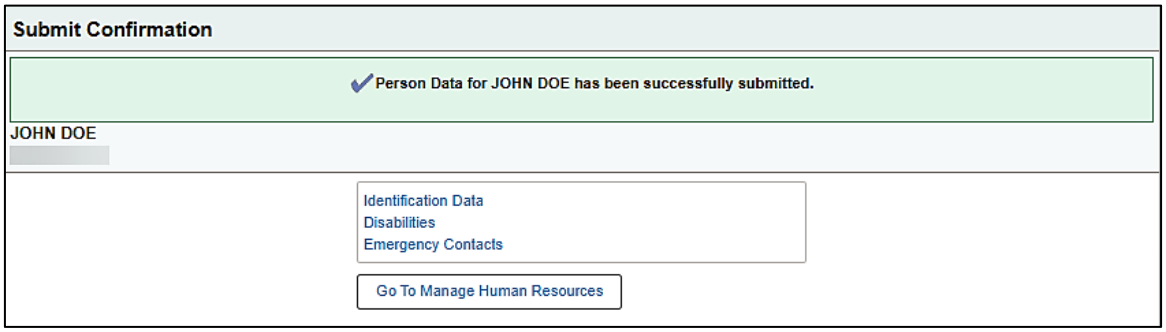
Validation messages may appear that include warnings and errors. If a Validation Warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving.



40. Click the **Next** button once all required updates are made.

The **Modify Person Step 2 of 2: Summary** page displays the Summary of Changes.

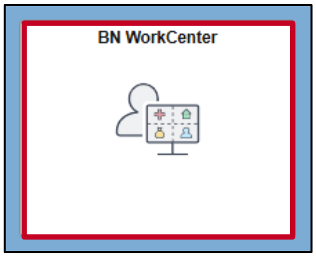
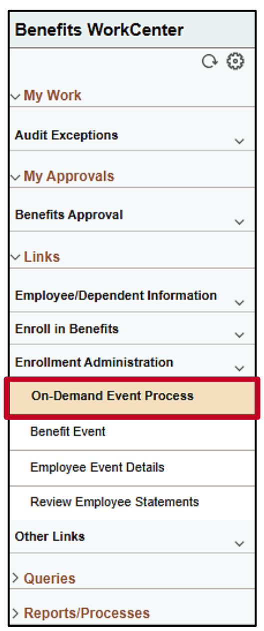


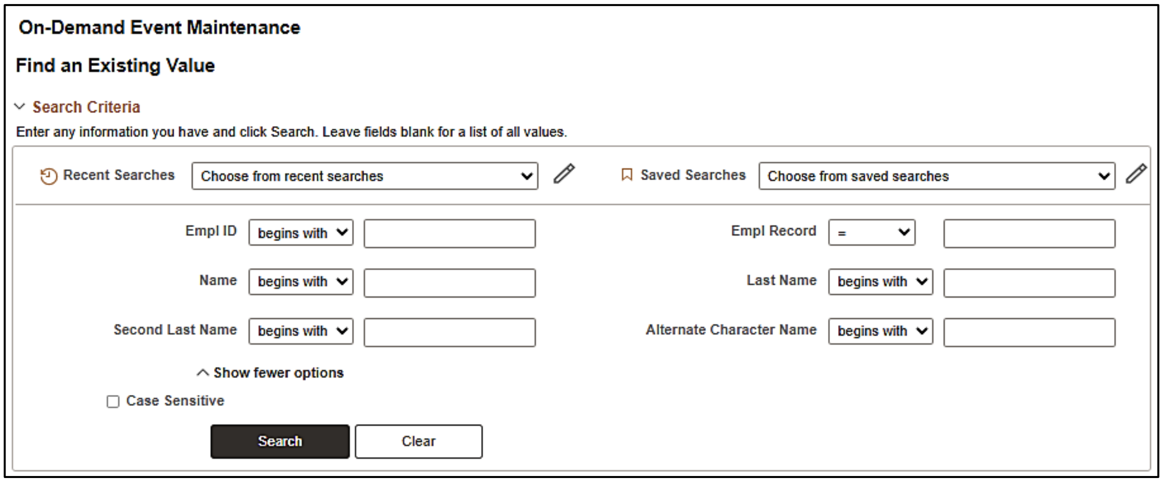
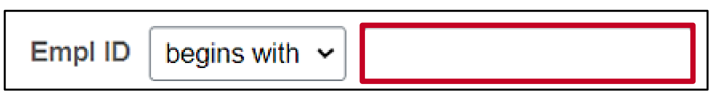
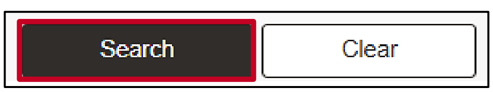
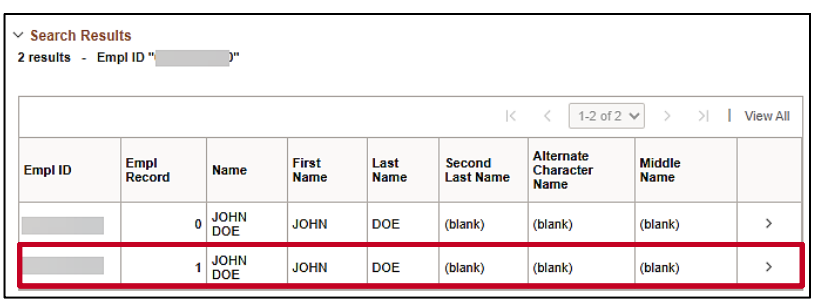
Step	Action
41.	Click the **Submit** button. 
The **Submit Confirmation** page displays. 	
42.	Run the **Employee Activity Report** for the retiree using the following navigation path: **NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report**
43.	Print the report and place the printed transaction in the retiree's file for future audit requests. **Note**: For additional information on the **Employee Activity Report** and the steps used to run this report, refer to the **HCM Human Resources Reports Catalog**. The **HCM Human Resources Reports Catalog** can be found on the Cardinal website under **Resources**.

Enrolling the ORP Retiree into a Non-Medicare Medical Plan

The next step is to enroll the retiree into a Non-Medicare Medical Plan. This transaction is completed by a BN Administrator after the Ben Admin process runs (every 4 hours).

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.

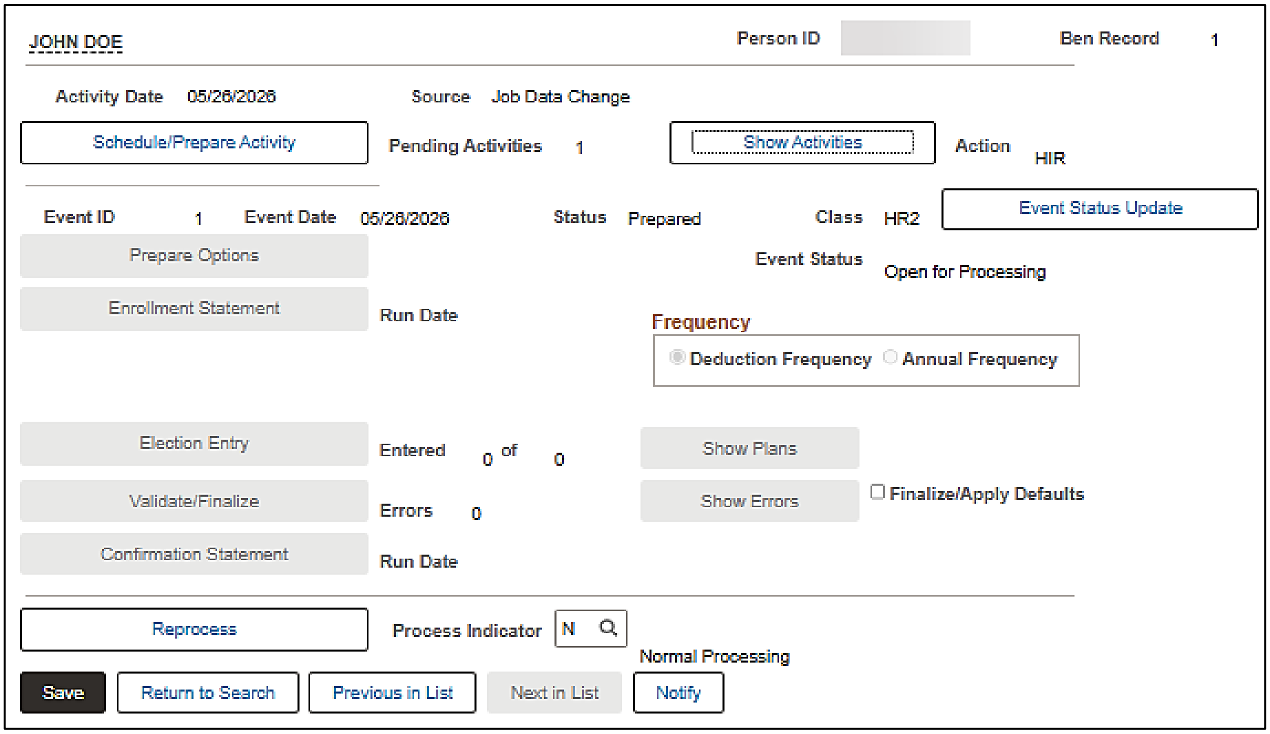
Step	Action
1.	Navigate to the **On-Demand Event Process** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > 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**

Step	Action
	The **On-Demand Event Maintenance 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 by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 
4.	Click the **Search** button. 
	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. 

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)	>

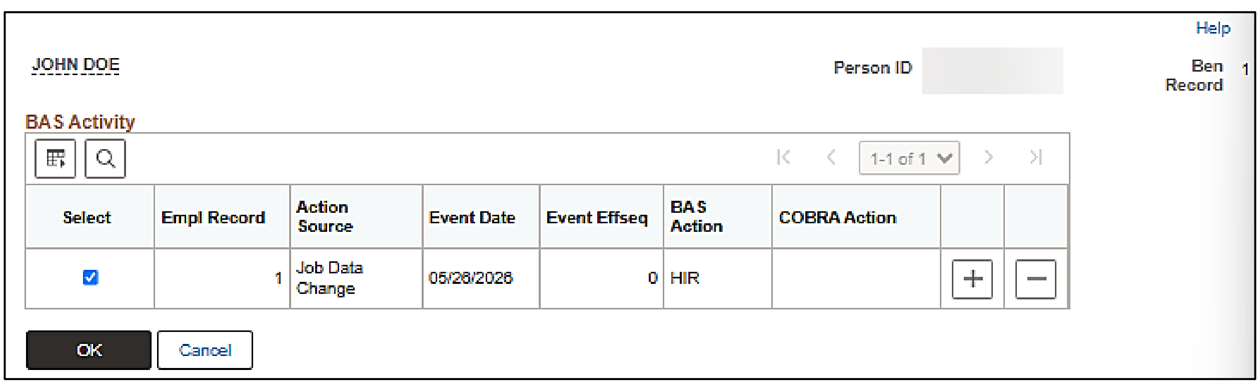
Step	Action

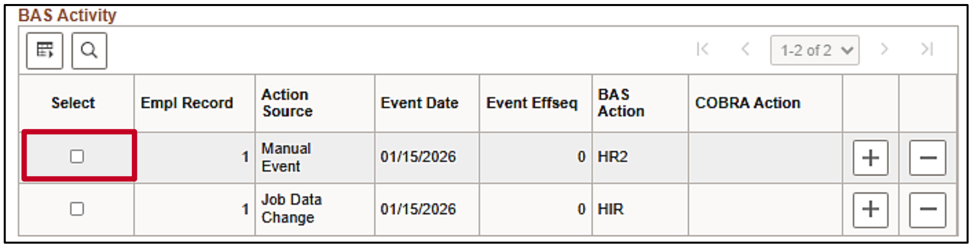
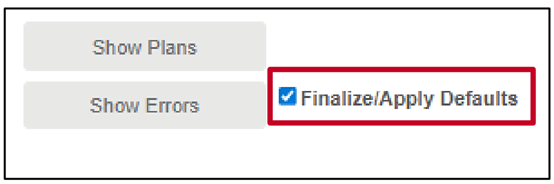
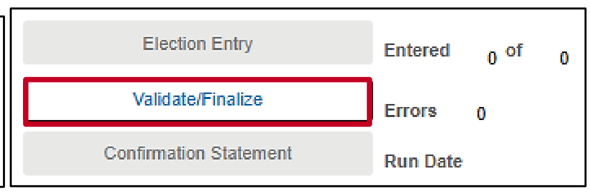
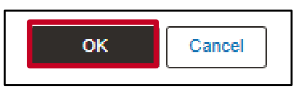
The **On-Demand Event Process** page displays for the selected retiree.



Step	Action
5.	Click the **Show Activities** button.

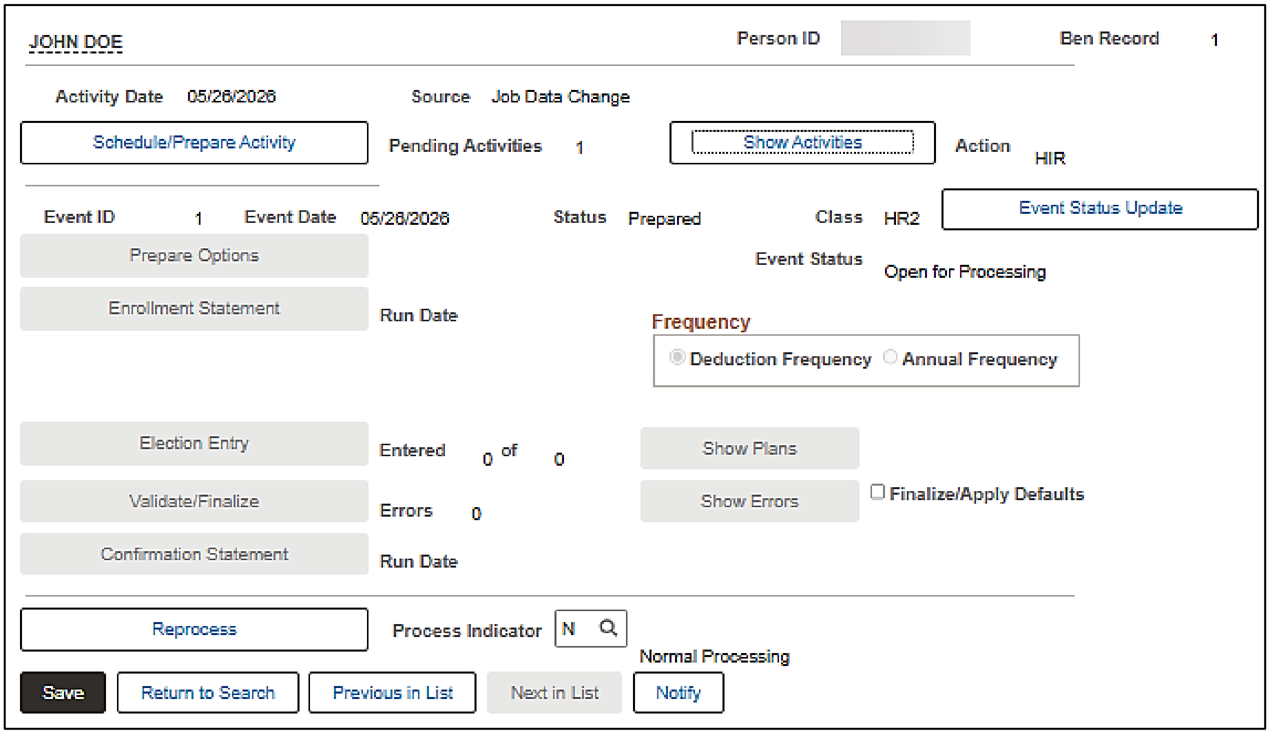
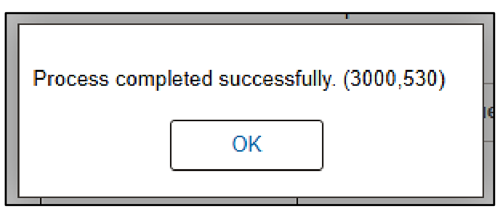
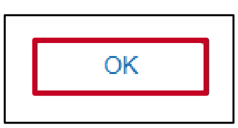
The **BAS Activity** page displays in a pop-up window.



Step	Action
	If the **BAS Activity** page displays an “HR2” event, the Benefits Administration process has not yet run. In this case, complete the “HR2” event first by clicking the **Schedule/Prepare Activity** button to manually run Ben Admin.   If the HR2 event does not go to “Prep None”, select the **Finalize/Apply Defaults** checkbox option, and then click the **Validate/Finalize** button to complete the Ben Admin process.  
6.	Click the **OK** button. 

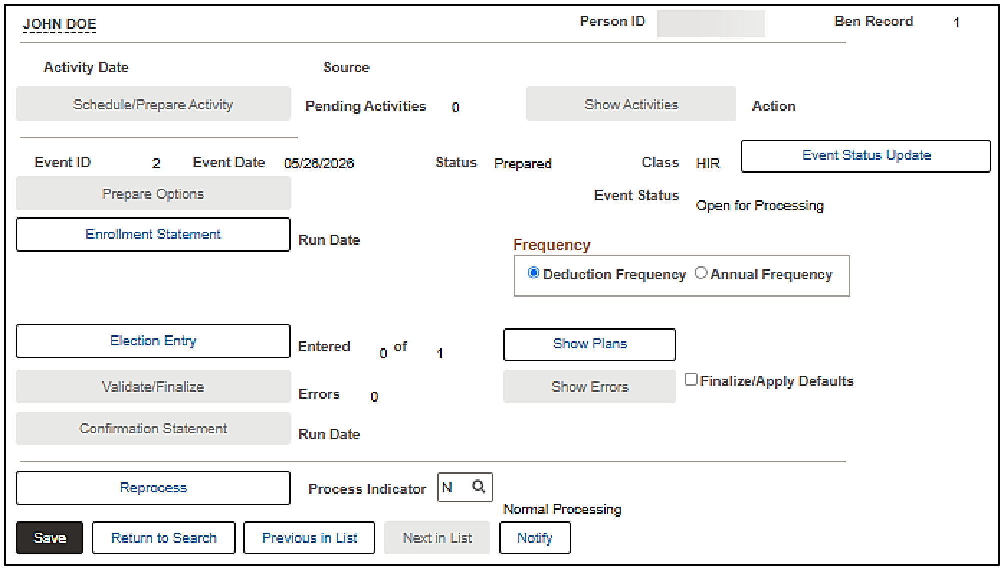
BAS Activity

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
	1	Manual Event	01/15/2026	0	HR2	
	1	Job Data Change	01/15/2026	0	HIR	

Step	Action
The **On-Demand Event Process** page redisplays. 	
7.	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. 	
8.	Click the **OK** button to close the message. 

Step	Action

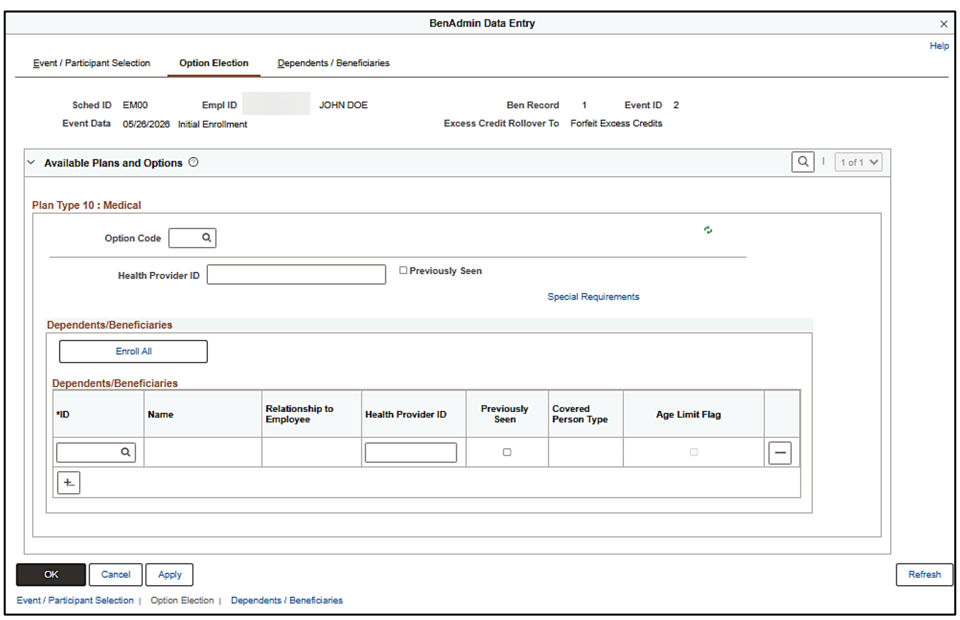
The **On-Demand Event Process** page redisplays.



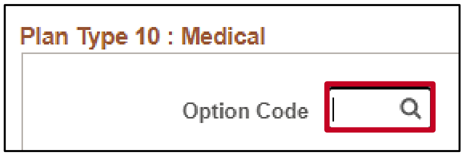
Step	Action
9.	Click the **Election Entry** button.

If the retiree is waiving coverage, there will be no Election Entry.

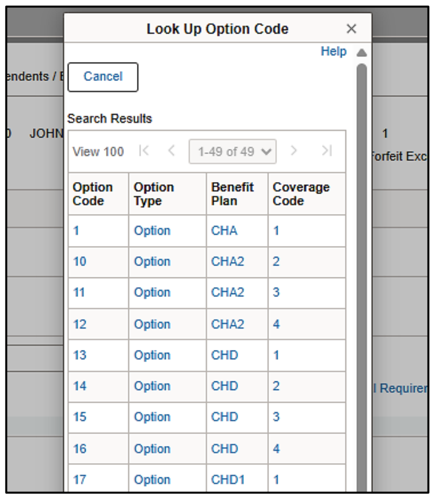
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.



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



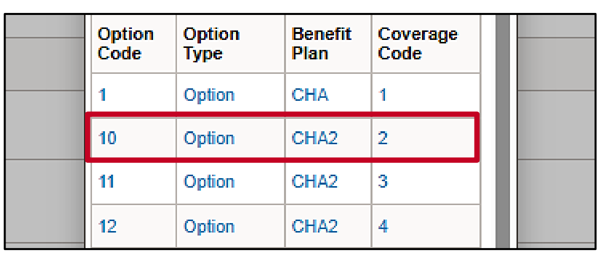
The **Look Up Option Code** page displays in a pop-up window.

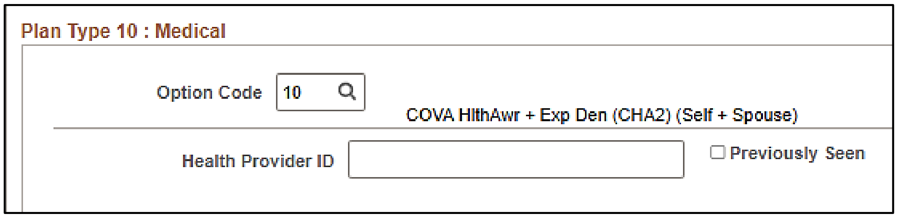
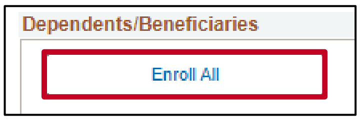
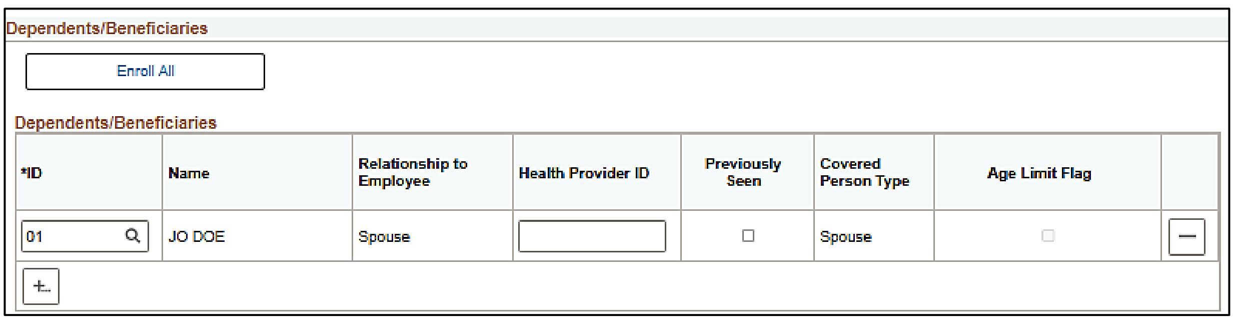
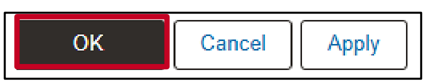


Step	Action
11.	Select the Benefit Plan and Coverage Code indicated on the enrollment form submitted by the retiree. For this example, **Benefit Plan** “CHA2”, **Coverage Code** “2” is selected.

Note: The Coverage Codes are:

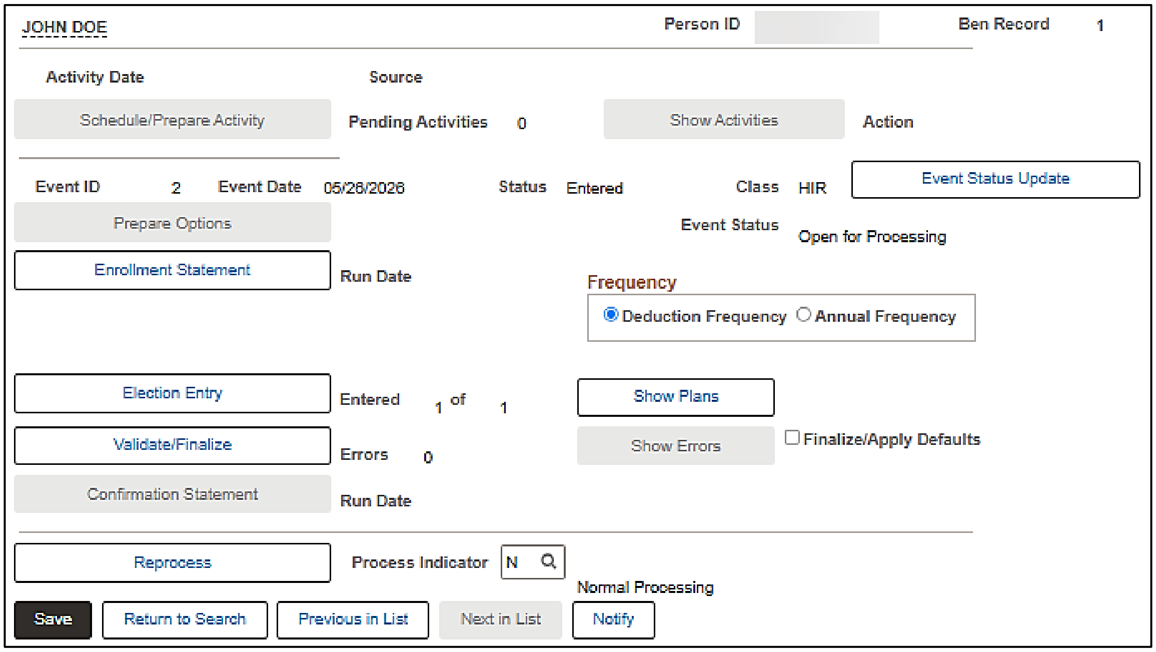
- 1 – Single Coverage
- 2 – Self + Spouse
- 3 – Self + Child
- 4 – Family (Employee + 2 or More Dependents)



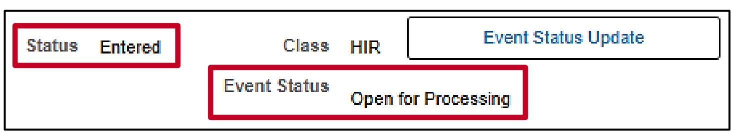
Step	Action
	The **Plan Type 10: Medical** section redisplays with the selected **Option Code** displayed. 
12.	Click the **Enroll All** button. 
	The retiree’s spouse displays in the **Dependents/Beneficiaries** section. 
13.	Click the **OK** button. 

Step	Action

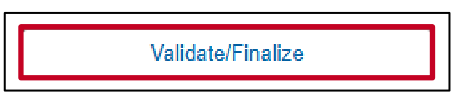
The **On-Demand Event Process** page redisplays.



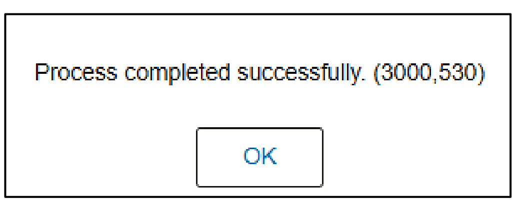
14. Confirm that the **Status** field is “Entered” and that the **Event Status** field is “Open for Processing”.



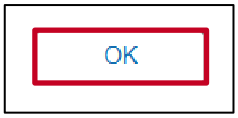
15. Click the **Validate/Finalize** button.



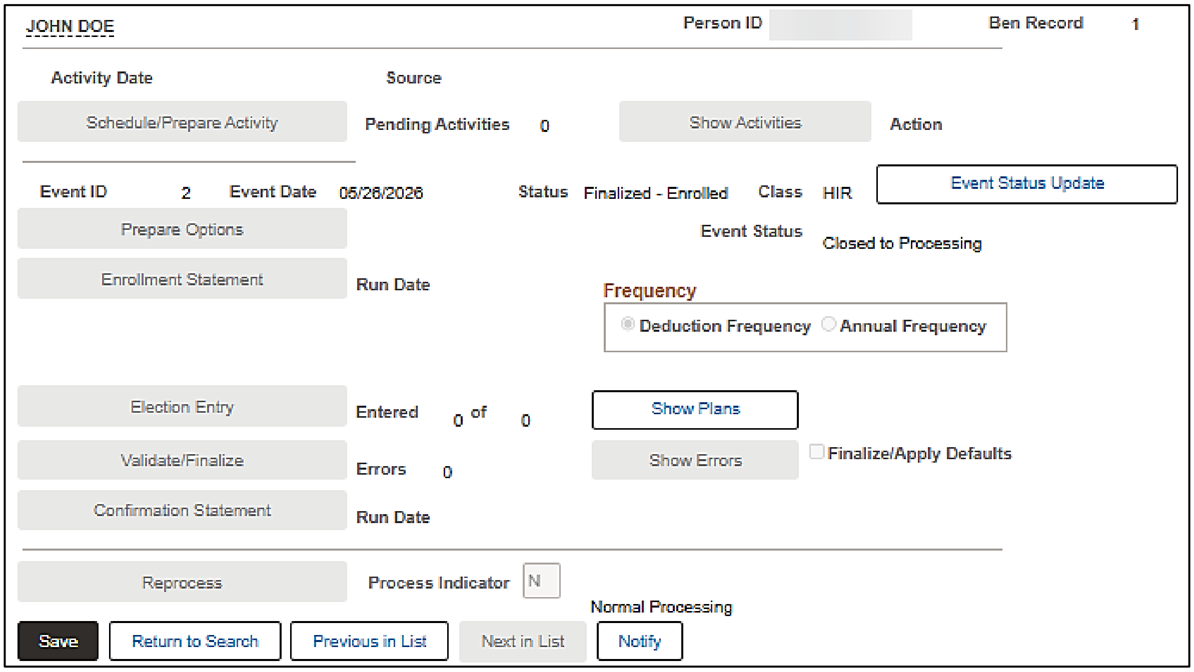
A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



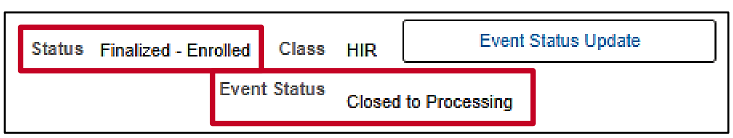
Step	Action
16.	Click the **OK** button to close the message.



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



Step	Action
17.	Confirm that the **Status** field is "Finalized – Enrolled" and the **Event Status** field is "Closed to Processing".



Scenario 2: Employee Retires (over 65) with Family Coverage

In this scenario, the employee is over 65 and the spouse is not. If the employee turns 65 with family coverage, hire the youngest dependent as an employee, add the other dependents to the youngest dependent's record, and enroll all in benefits.

Note: The process is similar when an employee over 65 retires, but the spouse is not over 65.

Retirement Process

First, the employee must be retired. This transaction is completed by an HR Administrator. Follow the same Retirement Process as shown in Scenario 1.

ORP Retiree New Hire

Next, the retiree is hired into the ORP Retiree position using a new employment instance. This transaction is completed by an HR Administrator. Follow the same ORP Retiree New Hire process as shown in Scenario 1.

Once these two processes have been completed, follow the steps in the next sections:

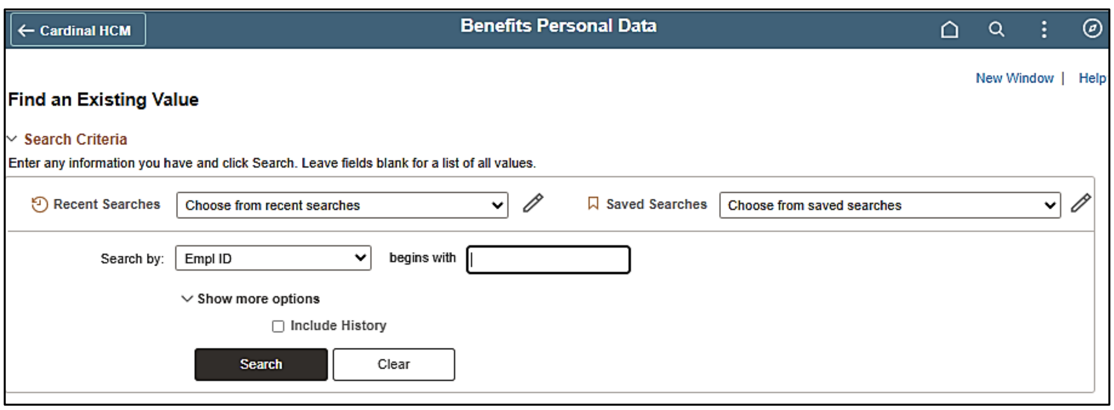
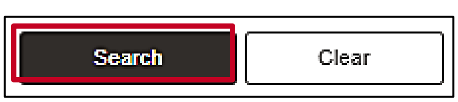
- Set Up Medicare for the ORP Retiree
- Enrolling the ORP Retiree into a Medicare Medical Plan
- Hire the Youngest Dependent as an Employee
- Enrolling the Dependent(s) in Benefits

Set Up Medicare for the ORP Retiree

The next step is to set up Medicare for the ORP Retiree. This transaction is completed by a BN Administrator after the retiree has been hired into the ORP Retiree Position, the Ben Admin process has run (every 4 hours), and the retiree has a Benefit Program of “RET” or a TLC Program.

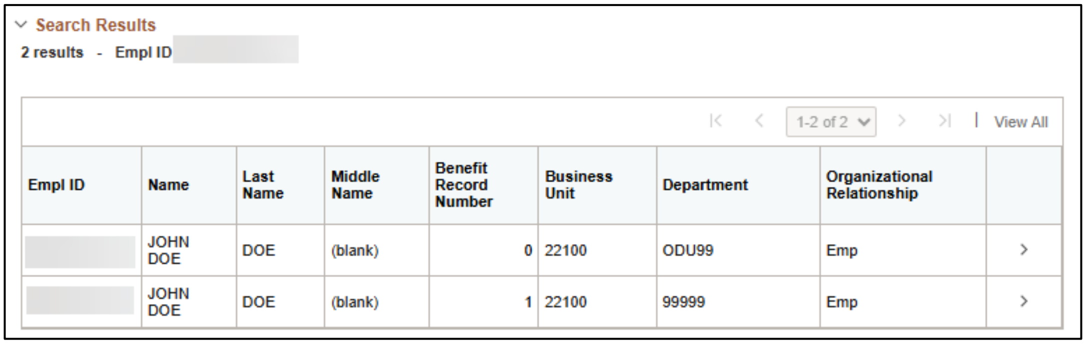
Before enrolling the retiree in Medicare Benefits, the BN Administrator must complete the information shown on the **Benefits Personal Data** page. If the retiree is waiving coverage, the process in this section is not necessary.

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 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. 
3.	Click the **Search** button. 

Step	Action

The Search Results display.

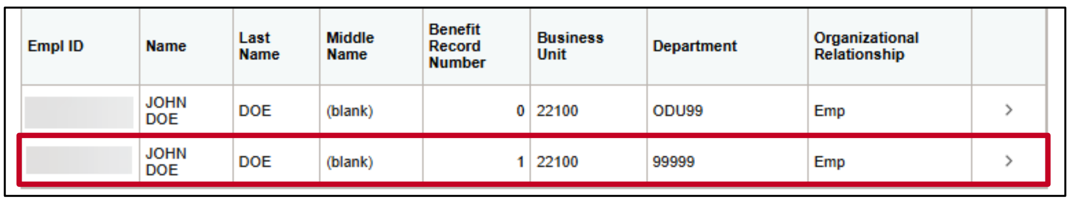


Search Results
2 results - Empl ID

1-2 of 2 View All

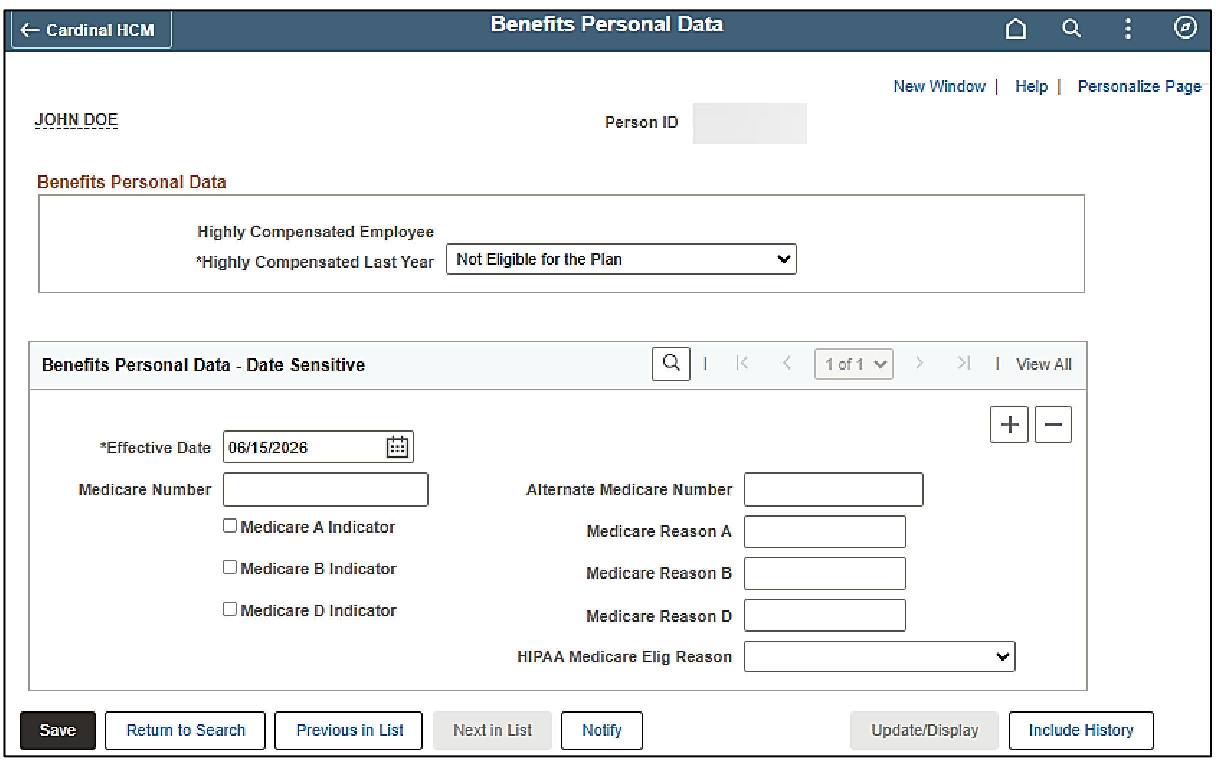
Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship	
	JOHN DOE	DOE	(blank)	0	22100	ODU99	Emp	>
	JOHN DOE	DOE	(blank)	1	22100	99999	Emp	>

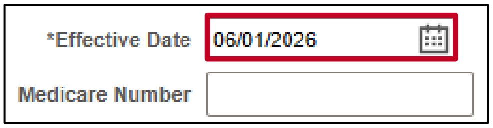
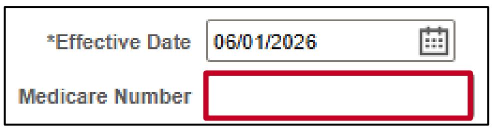
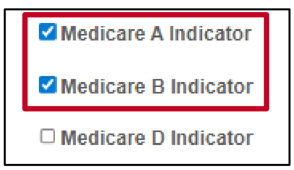
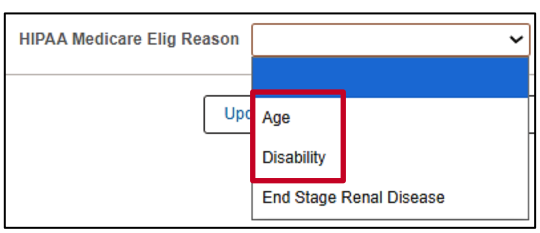
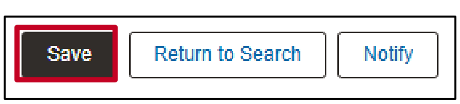
4. Click the **Drill In** (**>**) icon on the retirement job record row.



Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship	
	JOHN DOE	DOE	(blank)	0	22100	ODU99	Emp	>
	JOHN DOE	DOE	(blank)	1	22100	99999	Emp	>

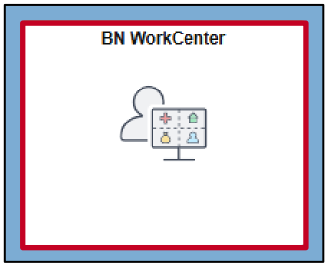
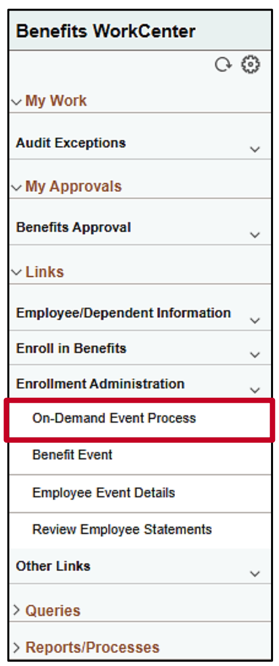
The **Benefits Personal Data** page displays.

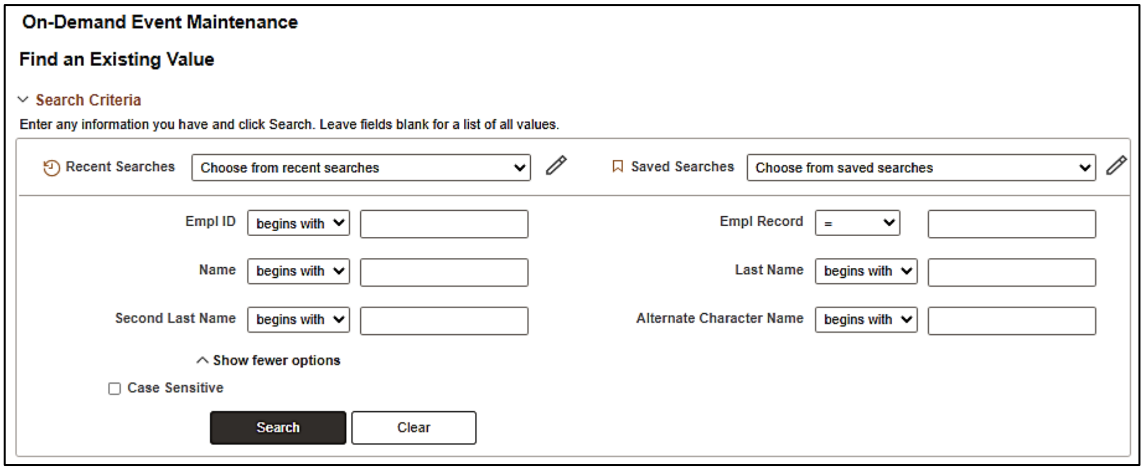
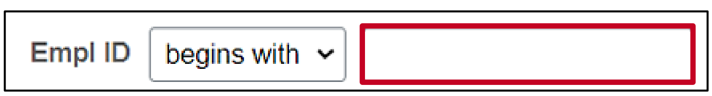
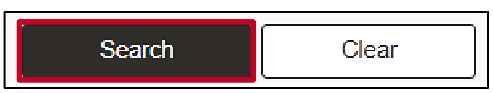
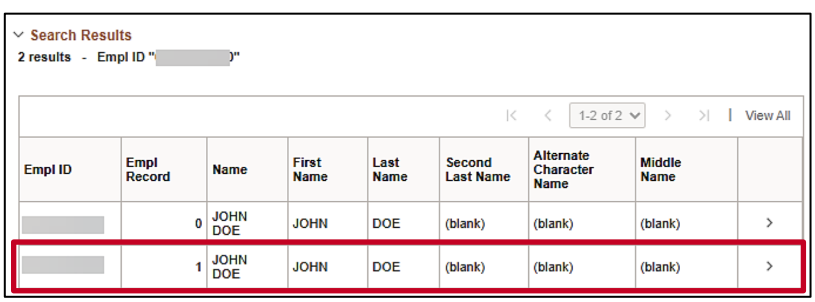


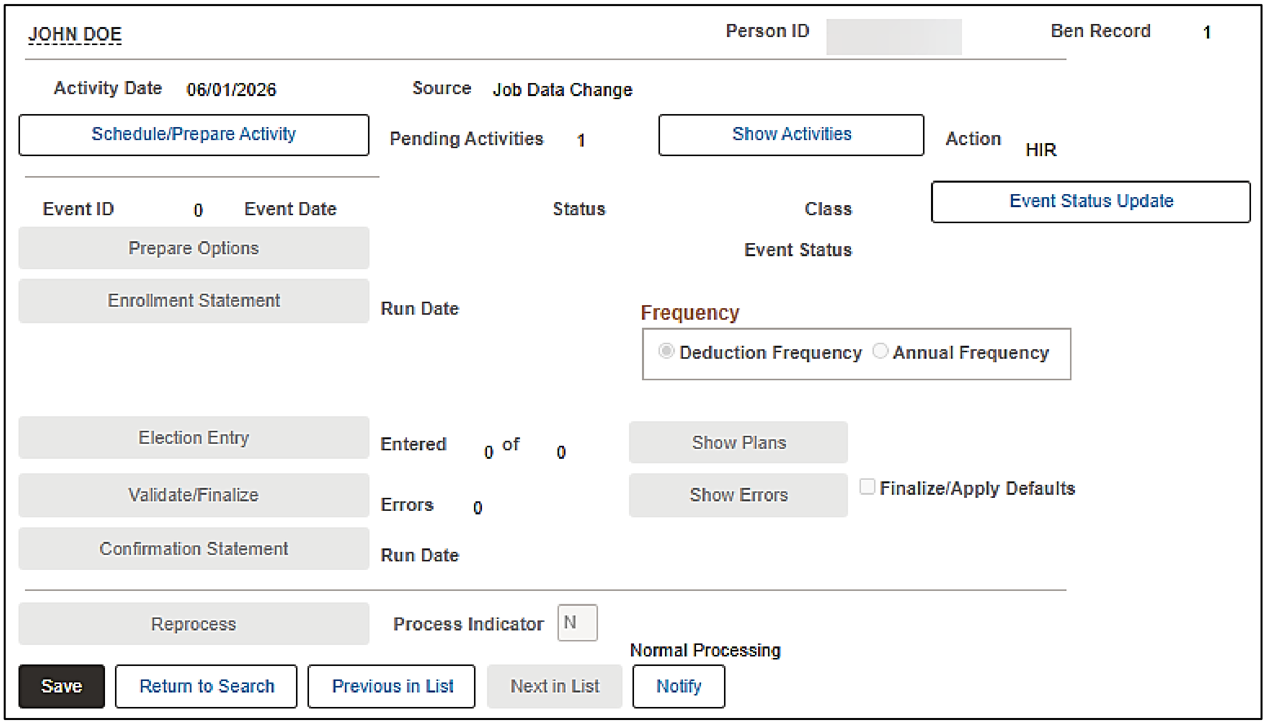
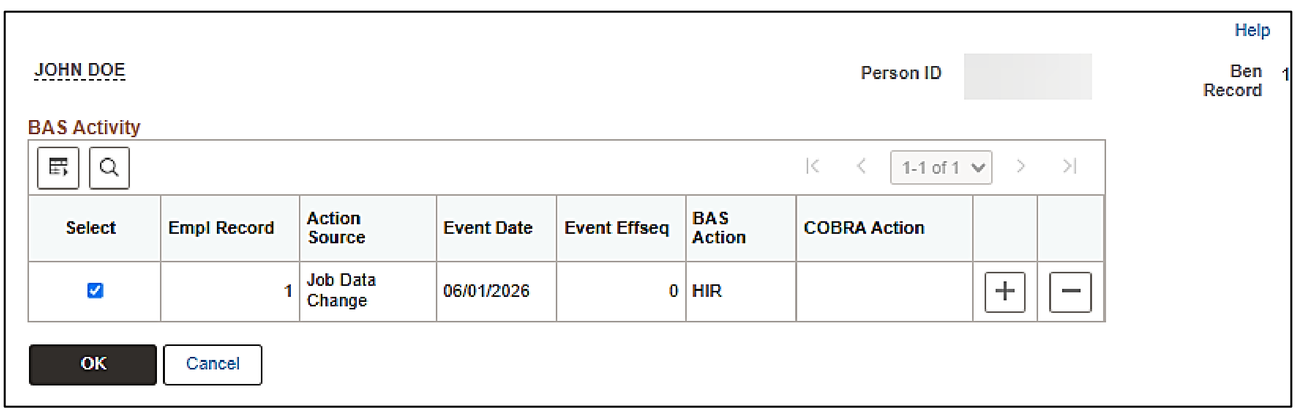
Step	Action
5.	Click the **Effective Date Calendar** icon in the **Benefits Personal Data – Date Sensitive** section and select the first day of the month in which the employee is retiring. In this example, "06/01/2026" is used. 
	The **Medicare Number** field will be entered by the Agency BA when received, and dashes are not accepted in the field. **Note**: Prescription coverage may be delayed until a 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. 

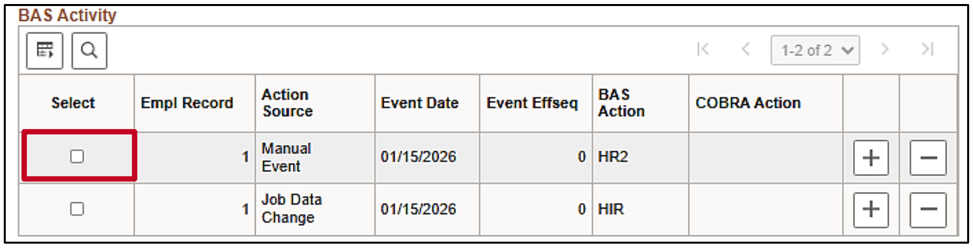
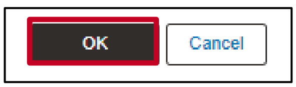
Enrolling the ORP Retiree into a Medicare Medical Plan

The next step is to enroll the retiree into a Medicare Medical Plan. This transaction is completed by a BN Administrator after the Ben Admin process runs (every four hours).

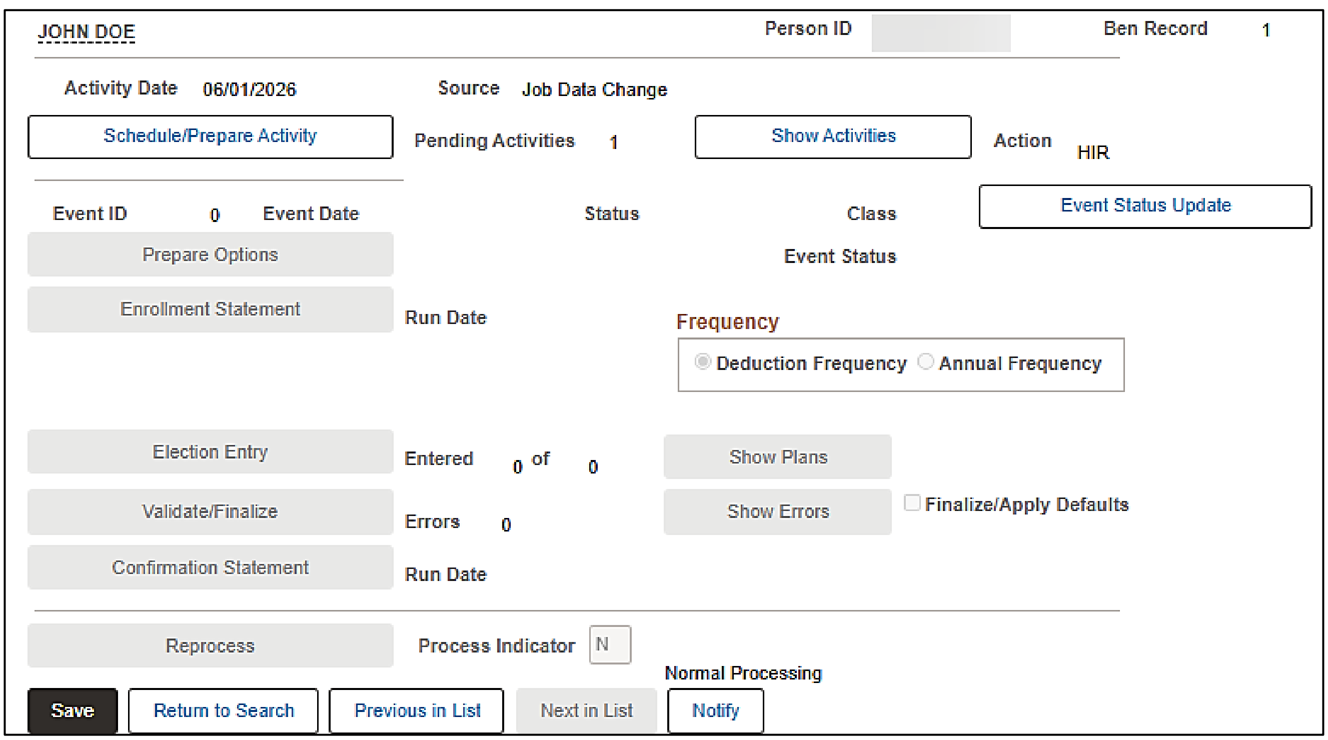
Step	Action
1.	Navigate to the **On-Demand Event Process** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **Links > Enrollment Administration > 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**

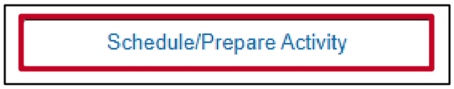
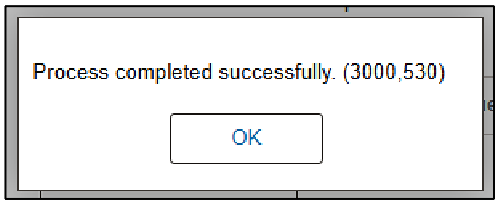
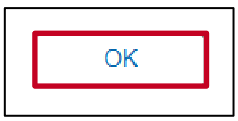
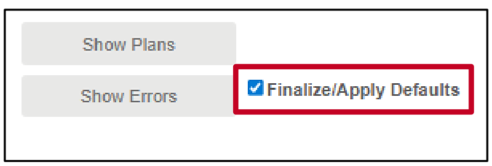
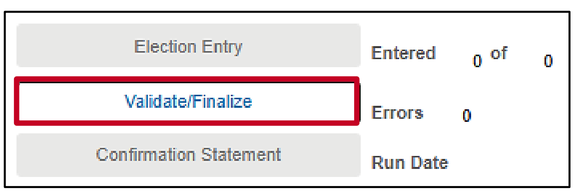
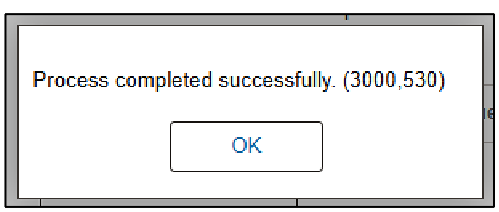
Step	Action
	The **On-Demand Event Maintenance Find an Existing Value Search** page displays. 
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
3.	Enter the retiree's Employee ID in the **Empl ID** field. **Note**: Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 
4.	Click the **Search** button. 
	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. 

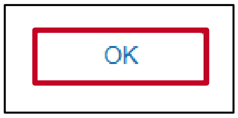
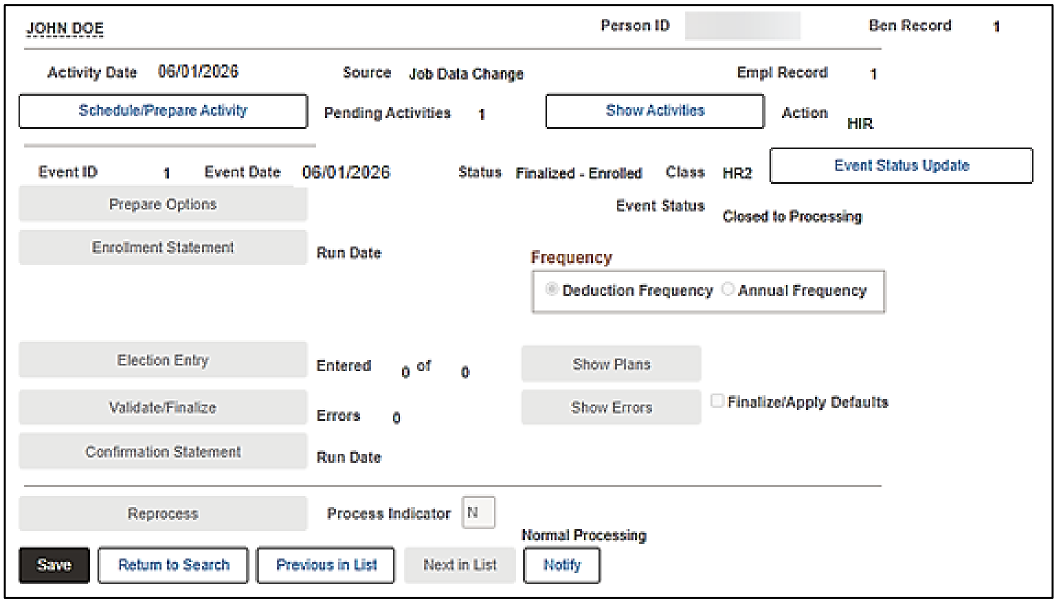
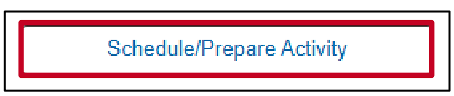
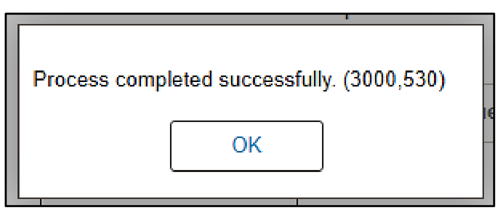
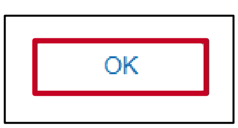
Step	Action
	The **On-Demand Event Process** page displays for the selected retiree. 
5.	Click the **Show Activities** button. 
	The **BAS Activity** page displays in a pop-up window. 

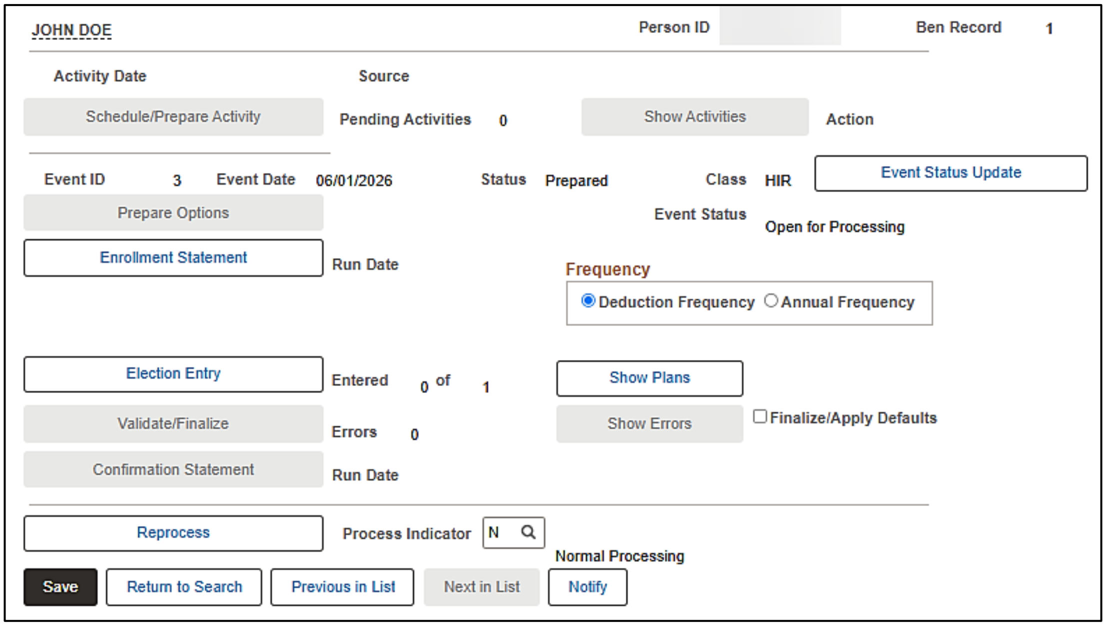
Step	Action
ℹ	If the **BAS Activity** page displays an “HR2” event, the Benefits Administration process has not yet run. In this case, complete the “HR2” event first by clicking the **Schedule/Prepare Activity** button to manually run Ben Admin.  
6.	Click the **OK** button. 

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

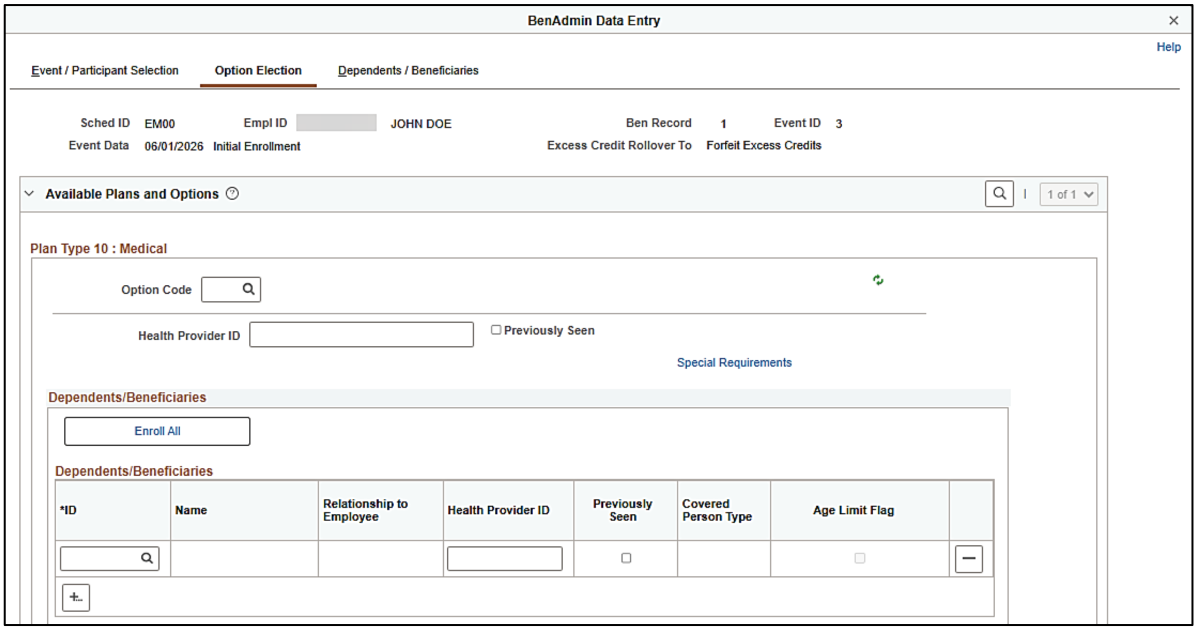


Step	Action
7.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. 
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
8.	Click the **OK** button to close the message. 
9.	Select the **Finalize/Apply Defaults** checkbox option. 
10.	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. 

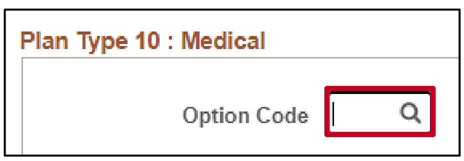
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>Click the OK button to close the message.
</td></tr>
<tr><td colspan="2">The On-Demand Event Process page redisplays.
</td></tr>
<tr><td>12.</td><td>Click the Schedule/Prepare Activity button to manually run the Benefits Administration process for this Benefit Event.
</td></tr>
<tr><td colspan="2">A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.
</td></tr>
<tr><td>13.</td><td>Click the OK button to close the message.
</td></tr>
</table>

Step	Action
	The **On-Demand Event Process** page redisplays. 
14.	Click the **Election Entry** button. 
	If the retiree is waiving coverage, there will be no Election Entry.

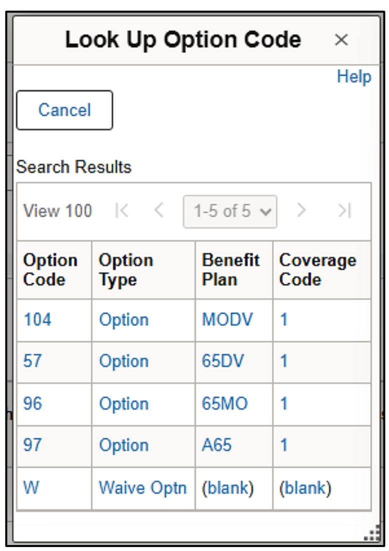
Step	Action
	The **BenAdmin Data Entry** page displays with the **Option Election** tab open by default.



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



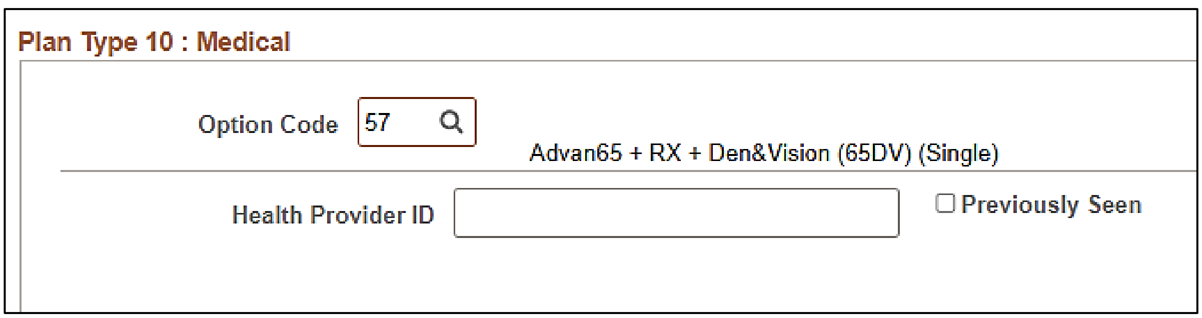
The **Look Up Option Code** page displays in a pop-up window.



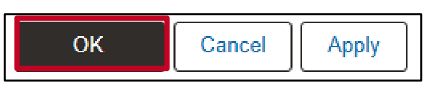
Step	Action
	If the Over 65 Benefit Plans do not populate, ensure the Medicare information was accurately entered. If the information is incorrect, update as needed and then complete an “Open” / “Assign Benefit Program” to the HIR Event to pick up the change. For additional information on re-opening and reprocessing Benefit Events, see the Job Aid titled **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.

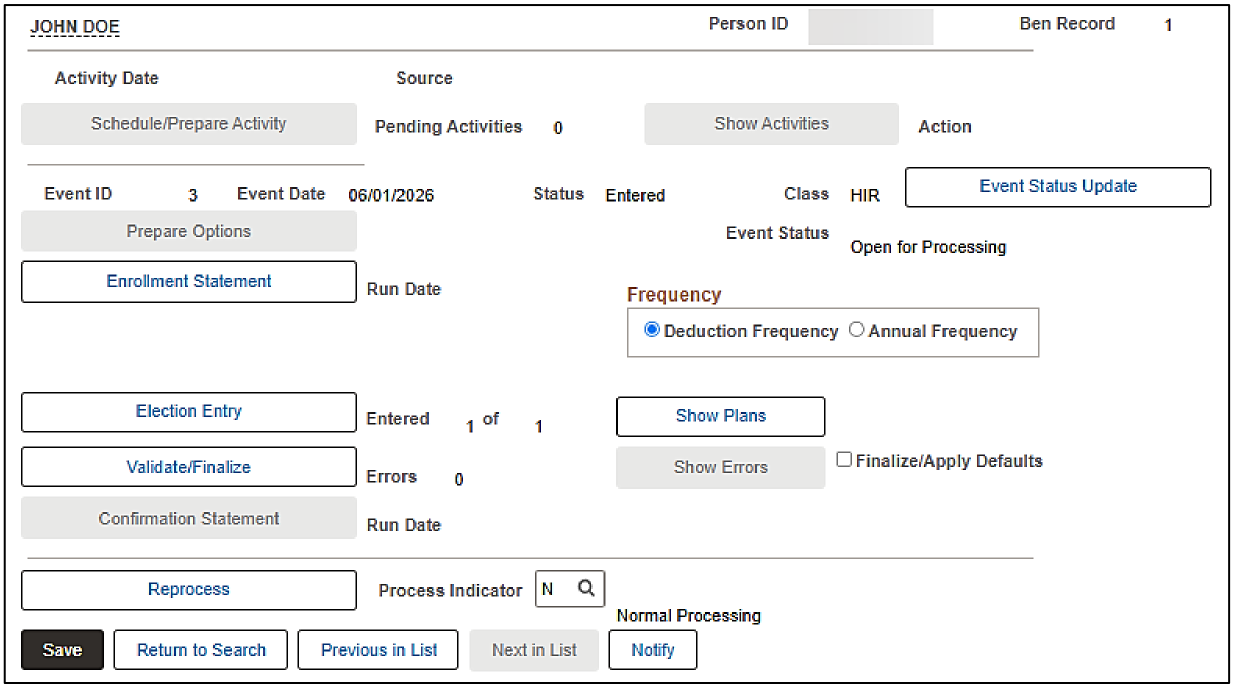
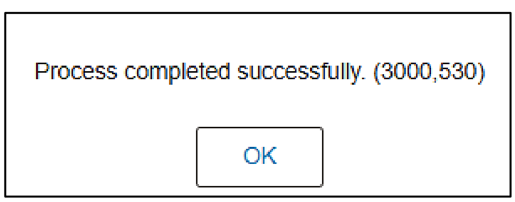
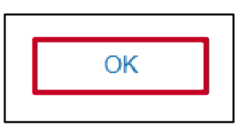
Option Code	Option Type	Benefit Plan	Coverage Code
104	Option	MODV	1
57	Option	65DV	1
96	Option	65MO	1
97	Option	A65	1
W	Waive Optn	(blank)	(blank)

The **Plan Type 10: Medical** section redisplays with the selected Option Code displayed.

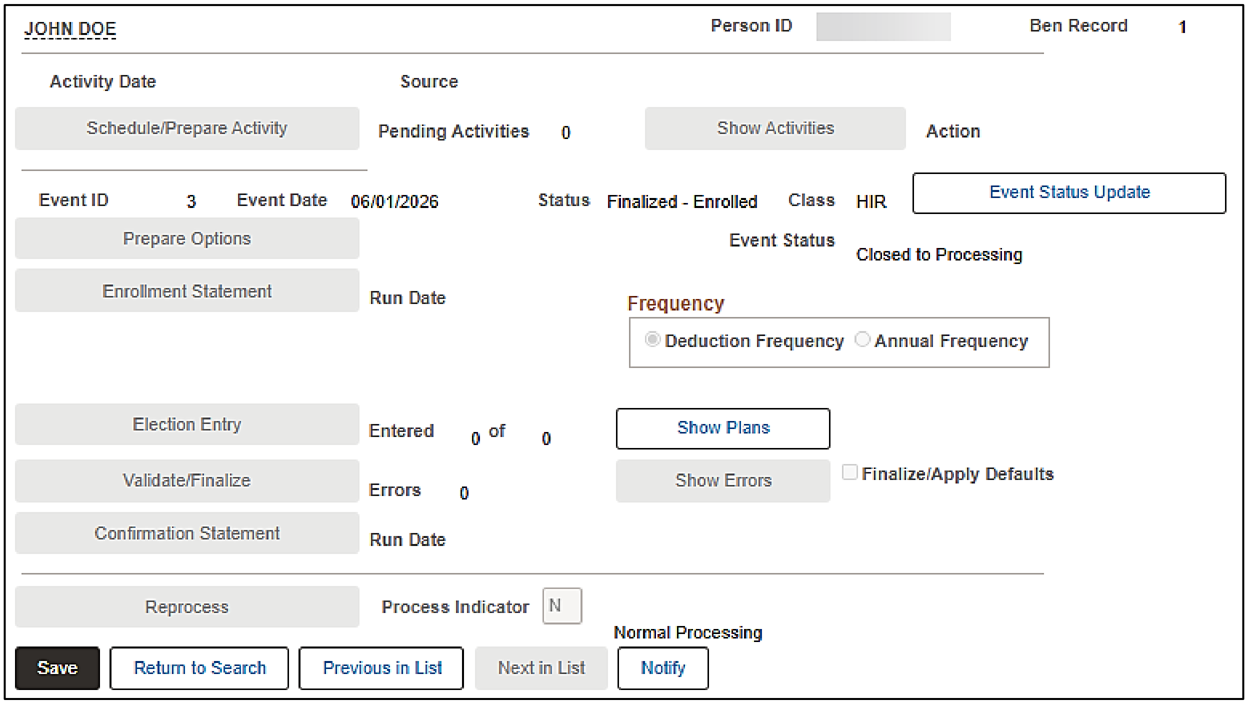


Step	Action
17.	Click the **OK** button.

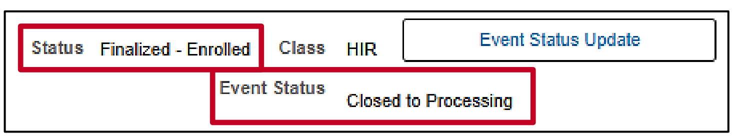


Step	Action
	The **On-Demand Event Process** page redisplays. 
18.	Click the **Validate/Finalize** button. 
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
19.	Click the **OK** button to close the message. 

Step	Action
	The **On-Demand Event Process** page redisplays.



20.	Confirm that the **Status** field is "Finalized – Enrolled" and the **Event Status** field is "Closed to Processing".



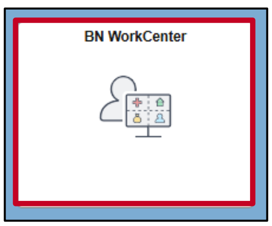
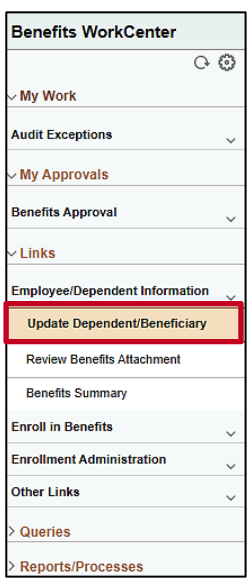
	The process is now complete for the ORP Retiree.

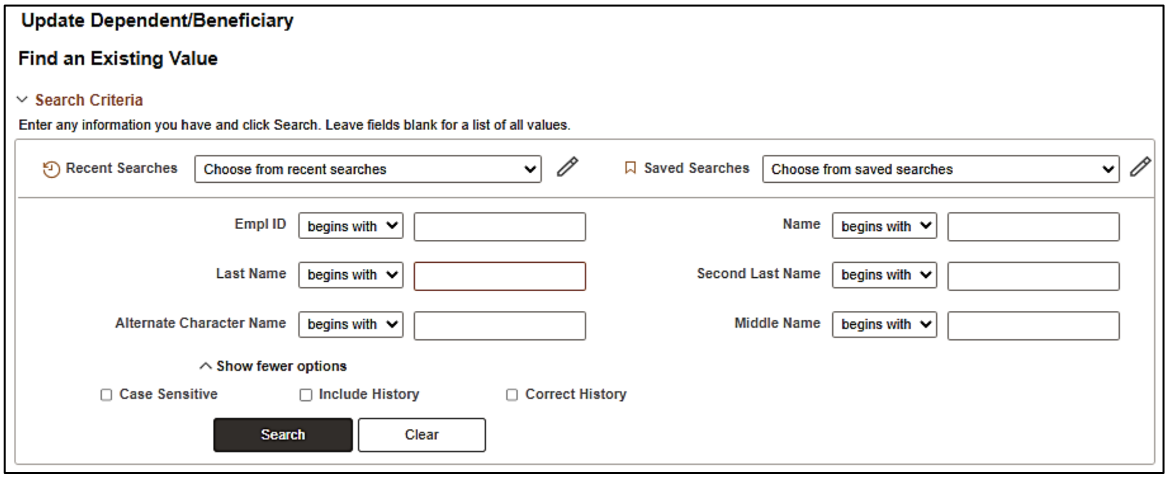
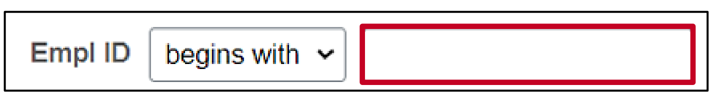
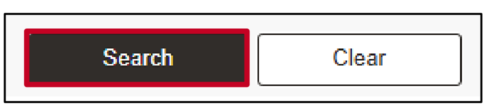
Hire the Youngest Dependent as an Employee

The next step is to hire the youngest dependent as an employee. Prior to hiring, the BN Administrator must gather the personal information (e.g., Social Security number, date of birth, etc.) for the youngest dependent from the Update Dependent/Beneficiary page of the retired employee and provide it to the HR Administrator. The HR Administrator can also gather this information with the BN Read-only Role. During this process, the personal information for all additional dependents must be gathered for use later when enrolling in benefits.

Note: The same steps can be taken if the employee has "Self + Spouse" coverage and the employee is over age 65 and retires. Hire the under-65 spouse as an employee and enroll in benefits.

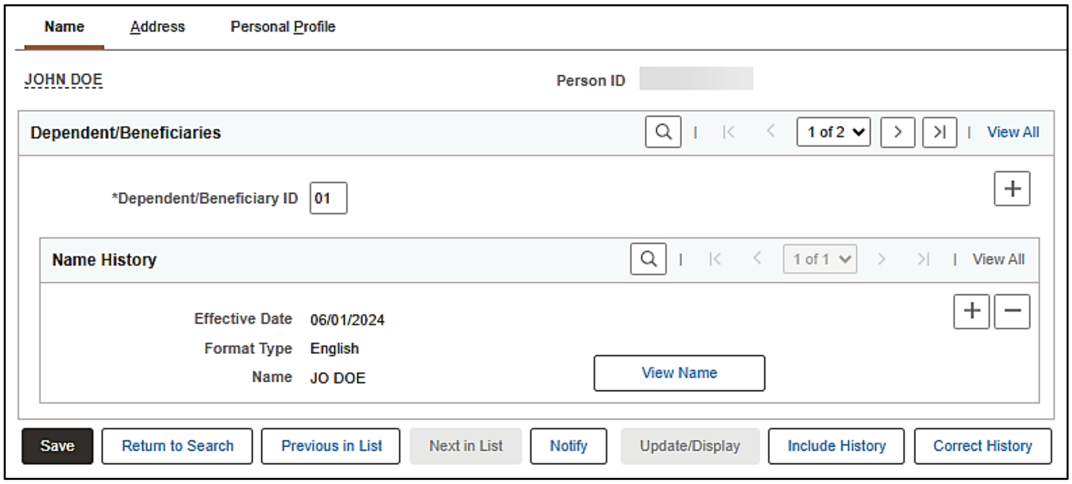
Note: Not all pages in this process are available from the **Benefits WorkCenter**. Therefore, this Job Aid may use both the **WorkCenter** and the **NavBar** to navigate to the applicable pages.

Step	Action
1.	Navigate to the **Update Dependent/Beneficiary** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of 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. 

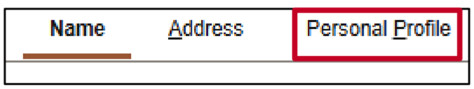
Step	Action
	Users can also access the **Update Dependent/Beneficiary** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary**
	The **Update Dependent/Beneficiary Find an Existing Value Search** page displays. 
	For more information 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 retired 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.	Click the **Search** button. 

Step	Action

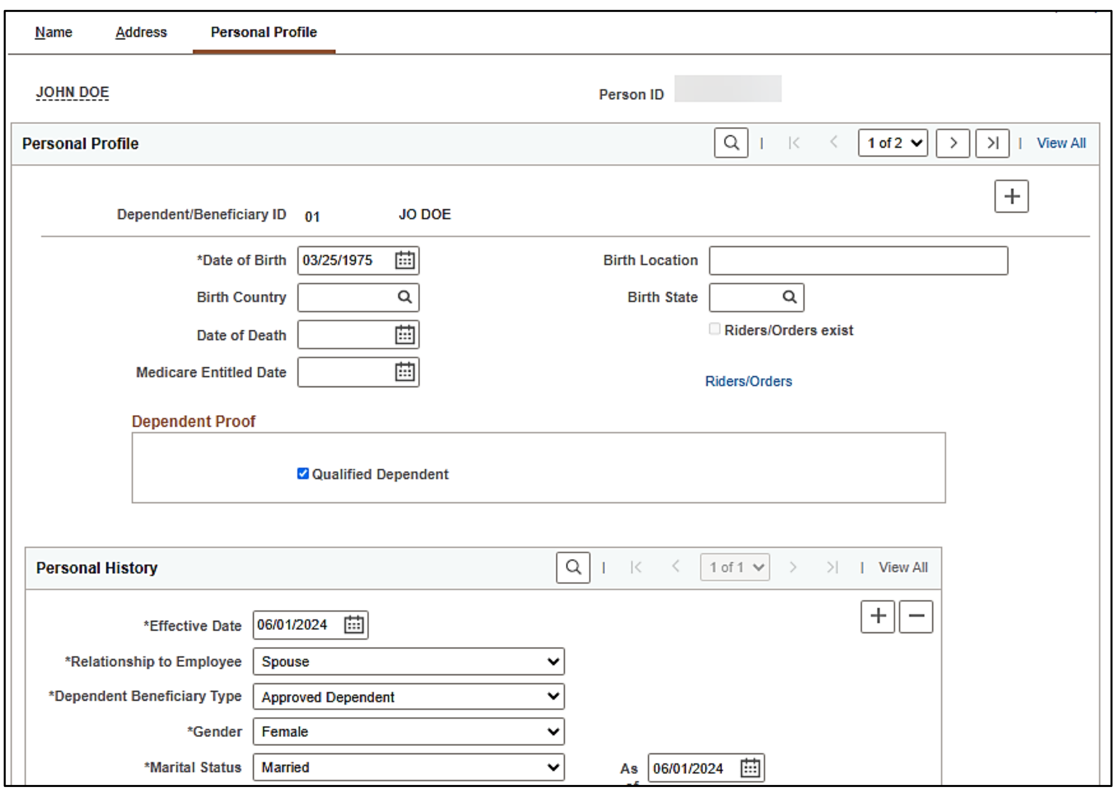
The **Update Dependent/Beneficiary** page displays for the retired employee with the **Name** tab displayed by default.

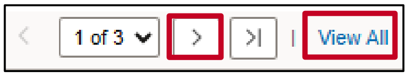


Step	Action
5.	Click the **Personal Profile** tab.

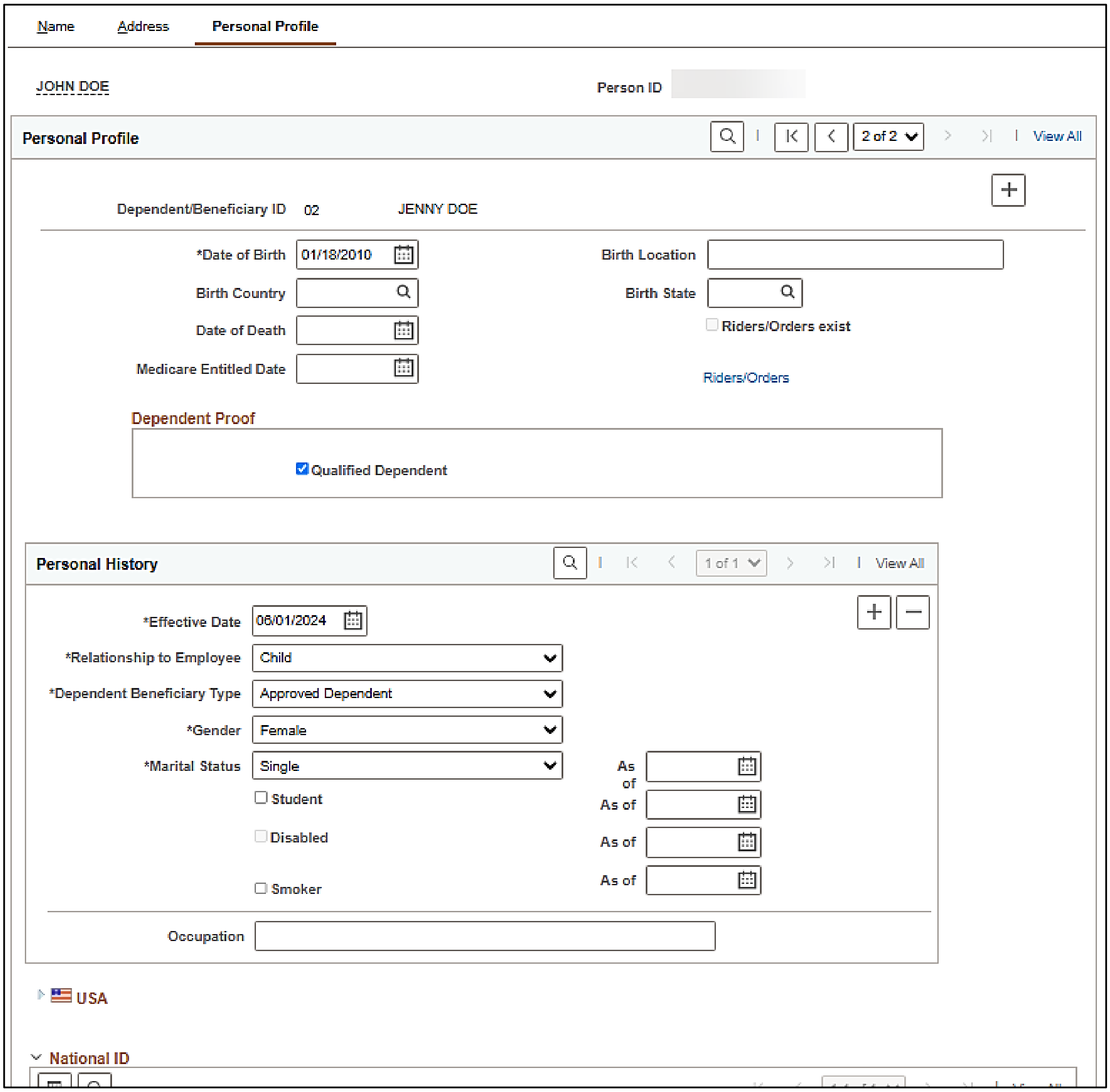


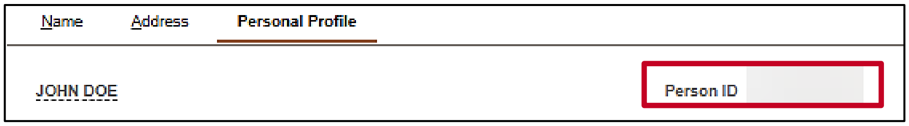
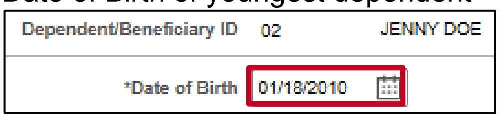
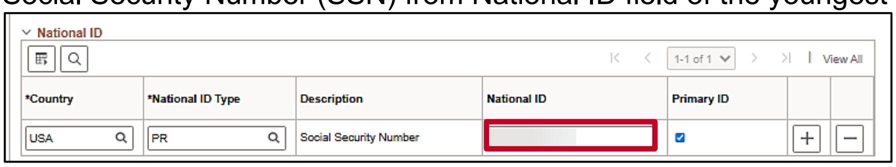
The **Personal Profile** page displays.



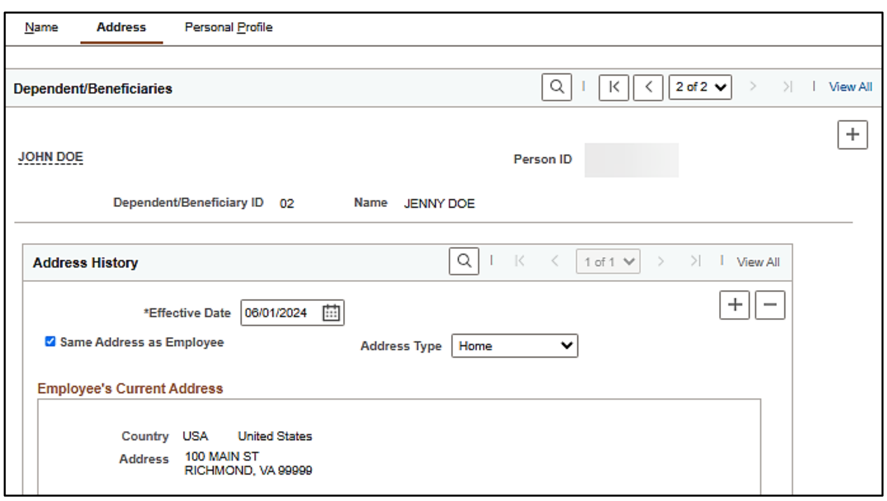
Step	Action
6.	Click the **Show Next Row** arrow or **View All** link to locate the youngest dependent on the retiree's family coverage plan. 

Example of the **Personal Profile** page of the youngest dependent on a retiree's family coverage.



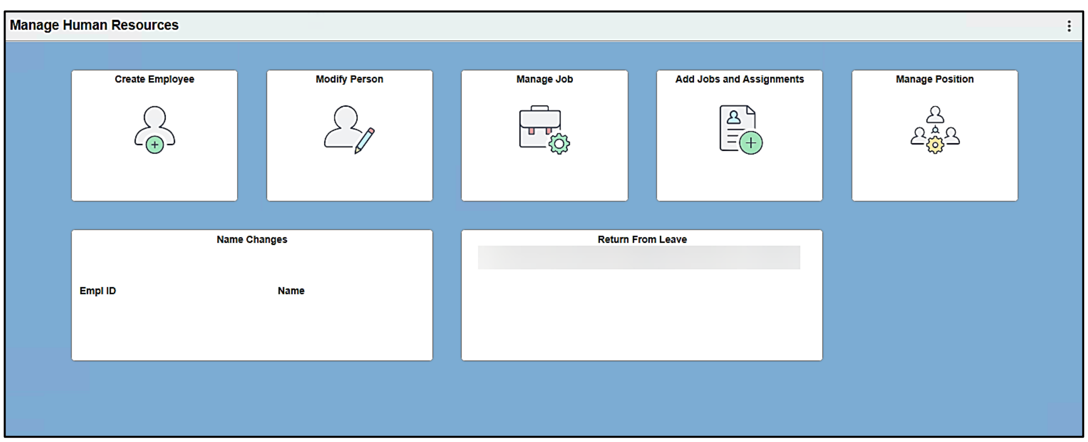
Step	Action
7.	Capture the following information to provide to the HR Administrator in order to complete the hire process for the youngest dependent: • Person ID of the retiree  • Name of the youngest dependent  • Date of Birth of youngest dependent  • Social Security Number (SSN) from National ID field of the youngest dependent 
	The same process would apply when a spouse that is under 65 and requires medical coverage and completing for an over-65 retiree who previously had “Self + Spouse” coverage.
8.	Click the **Address** tab to review the Address information for the youngest dependent. 

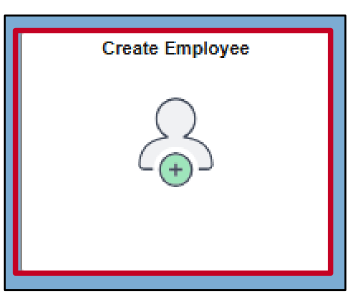
The **Address** page for the youngest dependent displays.

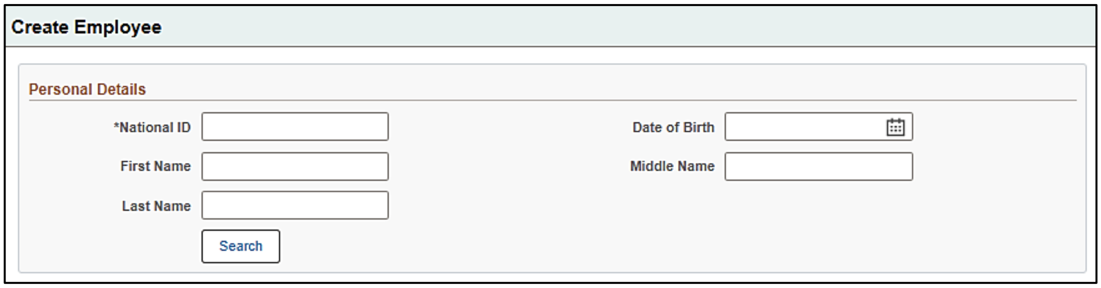
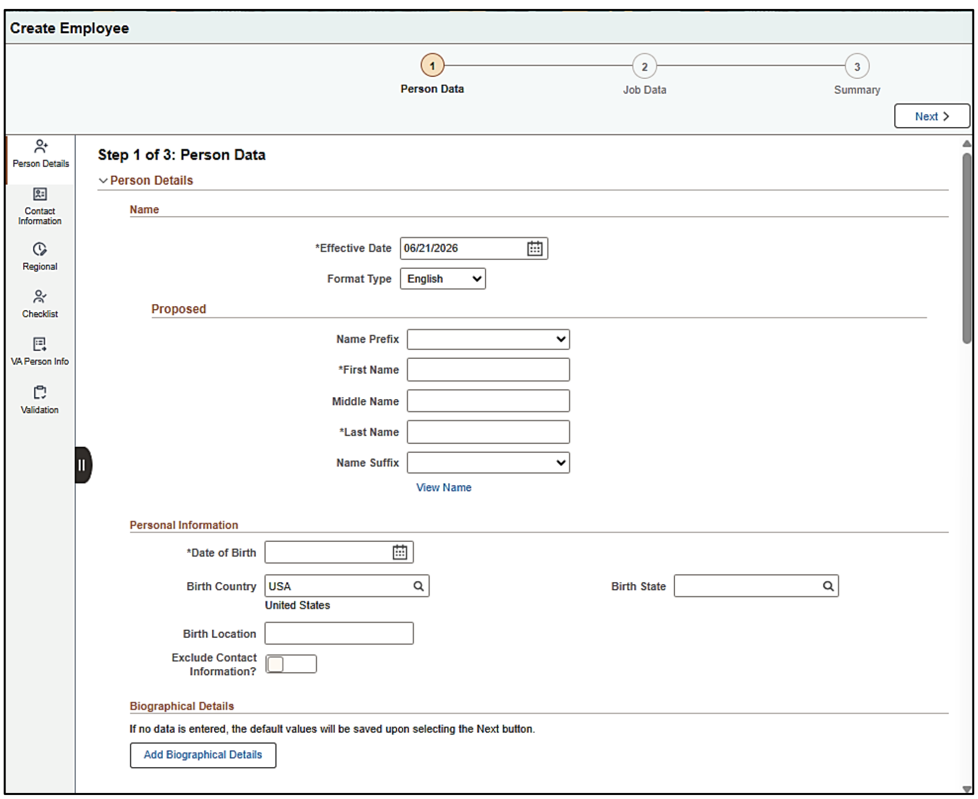


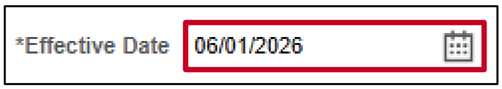
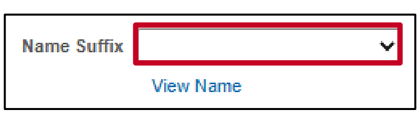
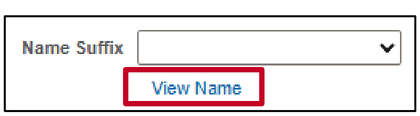
Step	Action
9.	Confirm that the information on this page is accurate for the youngest dependent. **Note**: This information will be used to hire the dependent as an employee.
10.	Repeat **Steps 5 – 9** to gather the same information for all dependents on the retiree's record. This information will be used later when enrolling the dependents in benefits.
	The next step is to hire the youngest dependent as an employee. This transaction is completed by the HR Administrator. **Note**: The process would be similar when hiring an under-65 spouse as an employee.
11.	Navigate to the **Create Employee** page by clicking the **Manage Human Resources** tile on the **Cardinal HCM Homepage**. 

The **Manage Human Resources** page displays.



Step	Action
12.	Click the **Create Employee** tile. 

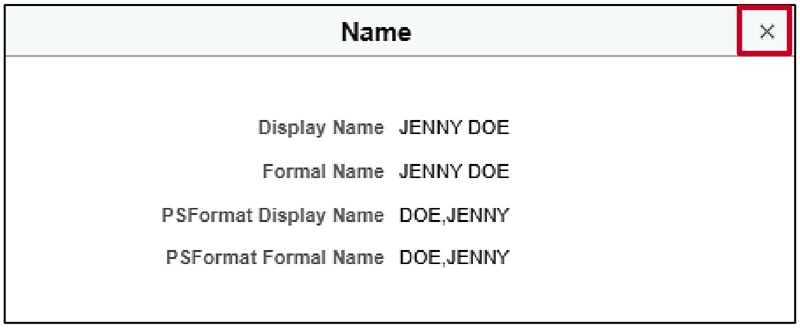
Step	Action
The **Create Employee** page displays. 	
13.	Enter the dependent's Social Security number in the **National ID** field. 
14.	Click the **Search** button. 
The **Create Employee** page displays with the **Person Details** tab (**Step 1 of 3: Person Data**) displayed by default. 	

Step	Action
15.	The **Effective Date** field defaults to the system date. Update to the hire date, which should match the retirement date of the retiree (“06/01/2026” in this example). **Note**: The **Effective Date** cannot be greater than today’s date when adding 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**. 
16.	Optionally, click the **Name Prefix** dropdown button and select the applicable prefix. 
17.	Enter the employee’s first name in the **First Name** field (required). 
18.	Optionally, enter the employee’s middle name or middle initial in the **Middle Name** field. 
	Do not add a period behind the middle initial.
19.	Enter the employee’s last name in the **Last Name** field (required). 
	Do not include suffixes (Jr, Sr, or IV) in the **Last Name** field.
20.	Click the **Name Suffix** dropdown button and select the applicable suffix as needed. 
21.	Optionally, click the **View Name** link to view the how the name will be displayed. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Name** page displays in a pop-up window.

Note: After reviewing, users can click the “**X**” button to close the pop-up window and adjust the name fields if needed.



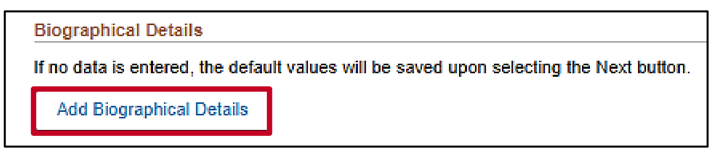
</td></tr>
<tr><td>22.</td><td>

Scroll down to the **Personal Information** section and click the **Date of Birth Calendar** icon to select the employee’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.

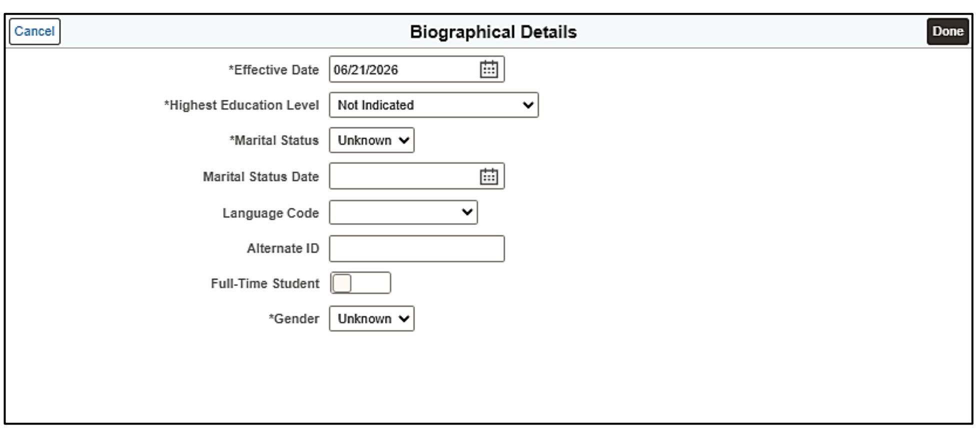
</td></tr>
<tr><td>23.</td><td>

Click the **Add Biographical Details** button.

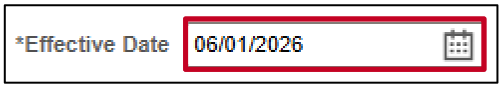
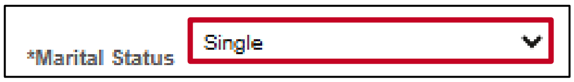
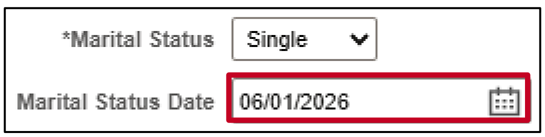
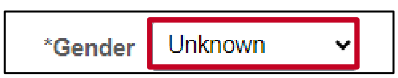


</td></tr>
<tr><td colspan="2">

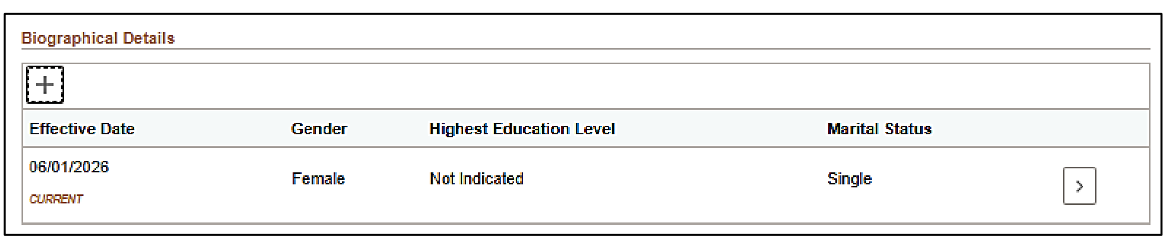
The **Biographical Details** page displays in a pop-up window.



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

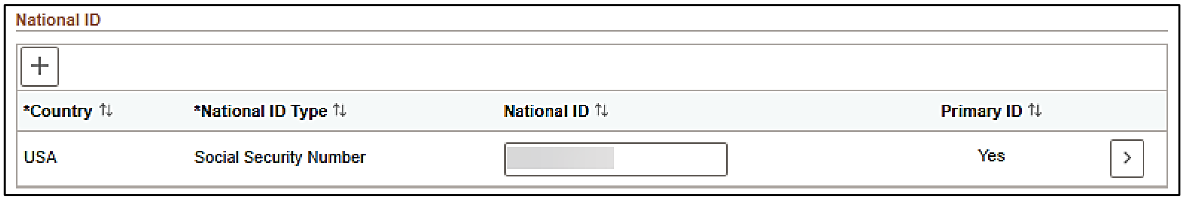
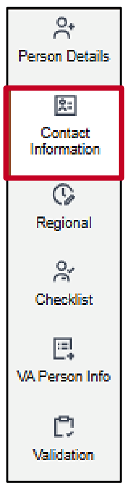
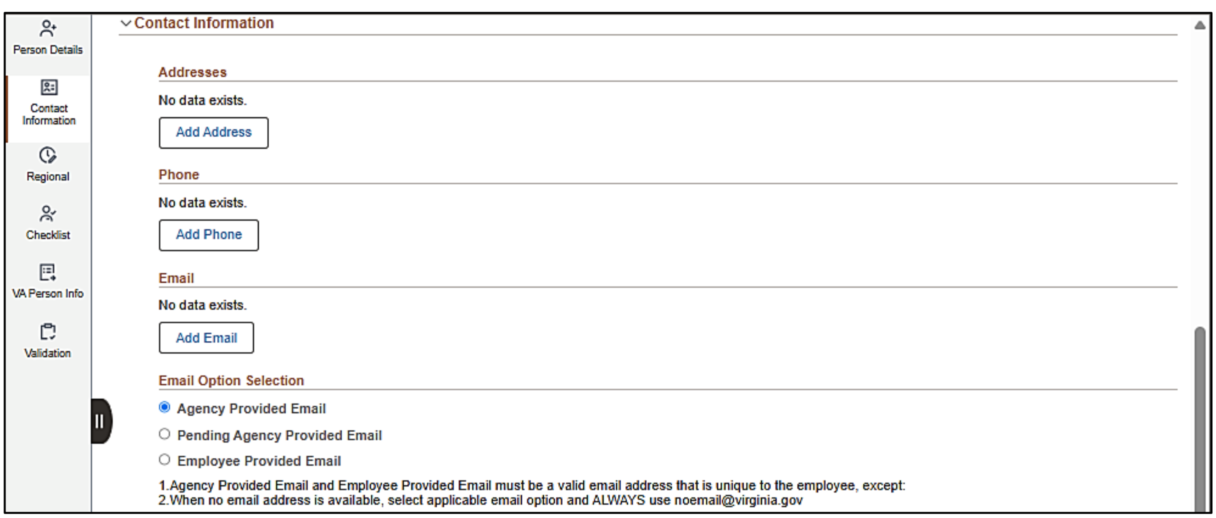
Step	Action
24.	Review the **Effective Date** field to ensure it matches the Effective Date in the **Name** section ("06/01/2026" in this example). If not, update to match. 
25.	Click the **Marital Status** dropdown button and select the dependent's legal marital status. 
	When a selection is made in the **Marital Status** field, the Marital Status Date updates to the Effective Date above. Do not change. 
26.	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. 
	The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
27.	Click the **Done** button. 

The **Biographical Details** section redisplays.



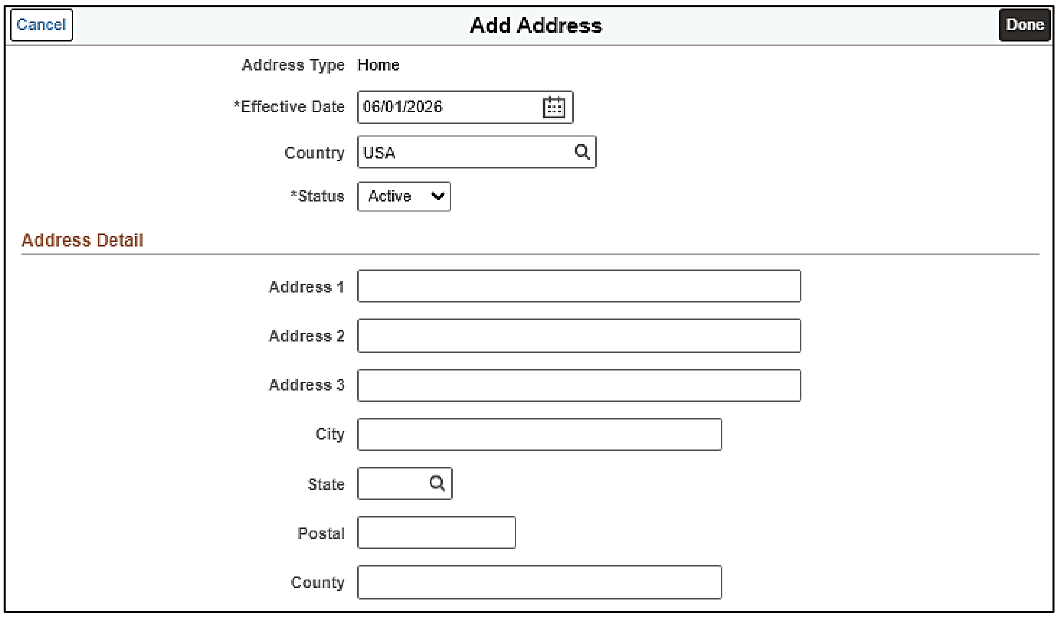
Biographical Details

Effective Date	Gender	Highest Education Level	Marital Status
06/01/2026 CURRENT	Female	Not Indicated	Single

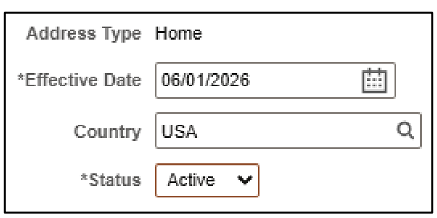
Step	Action
(info icon)	The **National ID** section auto-populates. 
28.	Click the **Contact Information** tab or use the scroll bar to scroll to the **Contact Information** section. 
The **Contact Information** section displays. 	

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>29.</td><td>Click the Add Adress button in the Addresses section.

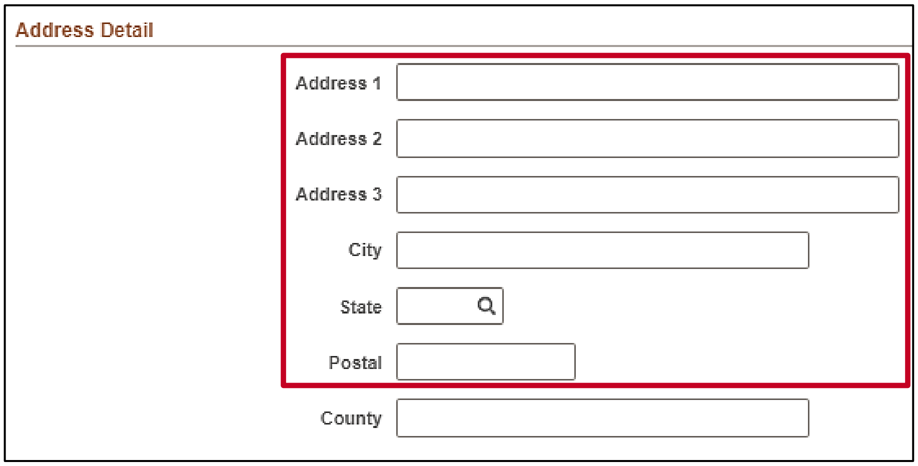
</td></tr>
<tr><td colspan="2">The Add Address page displays in a pop-up window.

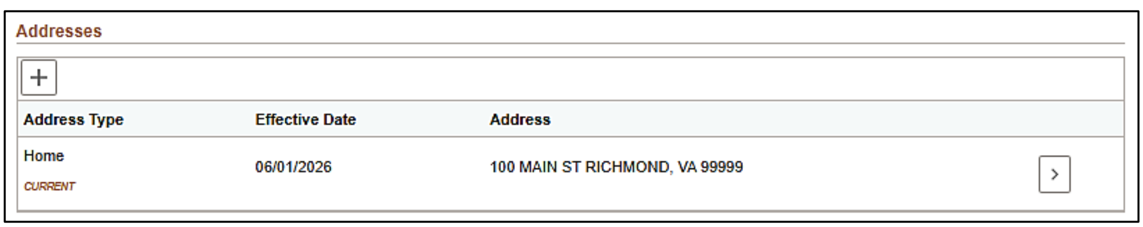
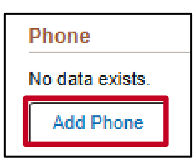


</td></tr>
<tr><td></td><td>The top section of the Add Address page auto-populates. Do not change.

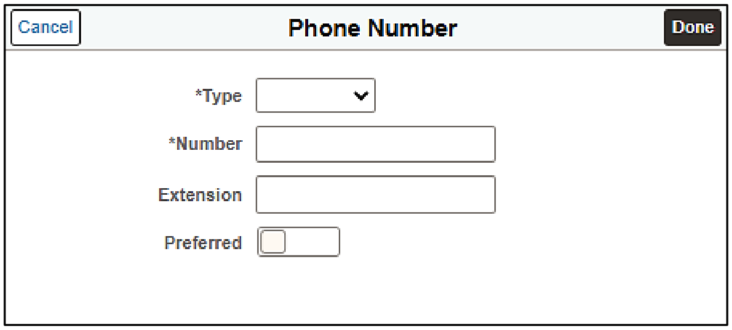


</td></tr>
<tr><td></td><td>An Address Type of “Home” is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>30.</td><td>Enter the employee’s address information using the applicable fields in the Address Detail section.

</td></tr>
<tr><td>ℹ</td><td>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.</td></tr>
<tr><td>31.</td><td>Click the Done button once the applicable Address Detail information has been entered.

</td></tr>
<tr><td colspan="2">The Addresses section redisplays.

</td></tr>
<tr><td>32.</td><td>Click the Add Phone button in the Phone section.

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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Phone Number page displays in a pop-up window.



</td></tr>
<tr><td>33.</td><td>Click the Type dropdown button and select the type of phone number being entered.

</td></tr>
<tr><td>34.</td><td>Enter the applicable telephone number in the Telephone field.

</td></tr>
<tr><td>ℹ</td><td>It is not necessary to enter dashes. When tabbing out of the field, the applicable phone number format will auto-populate.</td></tr>
<tr><td>35.</td><td>Select the Preferred field toggle to identify the dependent’s preferred phone number.

</td></tr>
<tr><td>36.</td><td>Click the Done button once the Phone Number information has been entered.

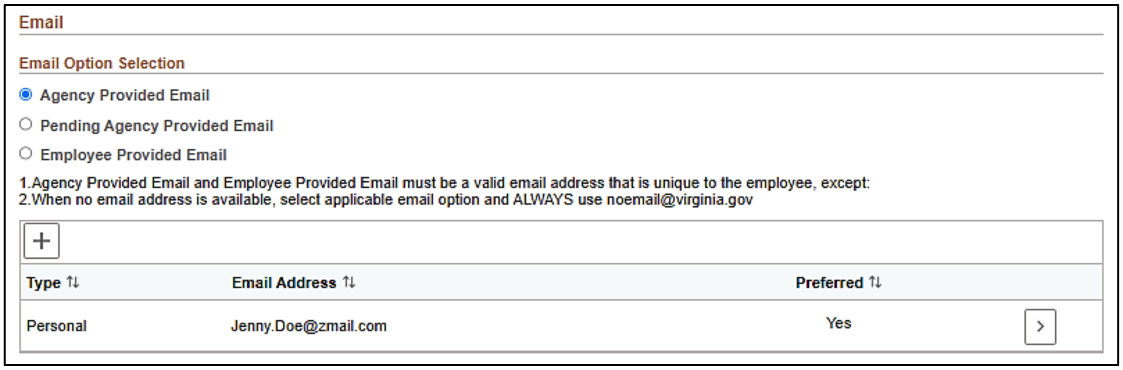
</td></tr>
<tr><td>ℹ</td><td>Additional phone numbers can be added for the employee as needed by clicking the Add button (+) and then repeating Steps 32 - 36.

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

Step	Action
37.	Click the **Add Email** button in the **Email** section. 
The **Email Address** page displays in a pop-up window. 	
38.	Click the **Email Type** dropdown button and select “Personal”. 
39.	Enter the dependent’s email address in the **Email Address** field. 
40.	Click the **Done** button. 

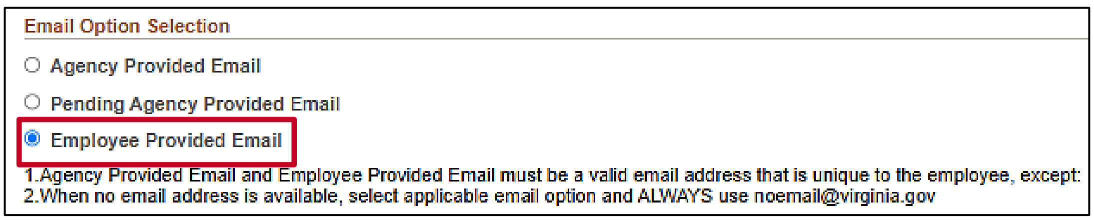
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Email** section redisplays and the **Preferred** field defaults to “Yes”.



</td></tr>
<tr><td>41.</td><td>

Select the **Employee Provided Email** radio button option in the **Email Option Selection** section.

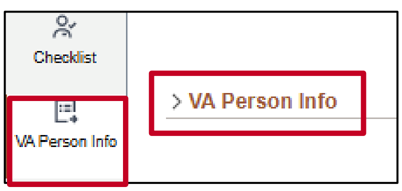


</td></tr>
<tr><td></td><td>

The **Regional** and **Checklist** sections are not required when hiring a dependent.

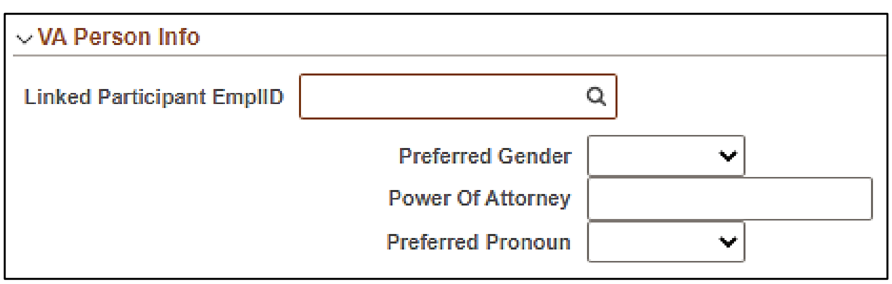
</td></tr>
<tr><td>42.</td><td>

Click the **VA Person Info** tab and click the **Expand** button to view the **VA Person Info** section.

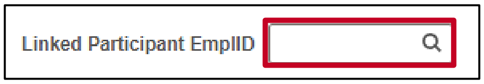
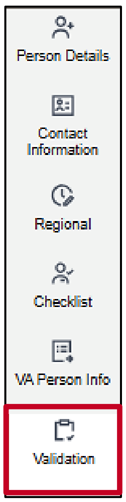
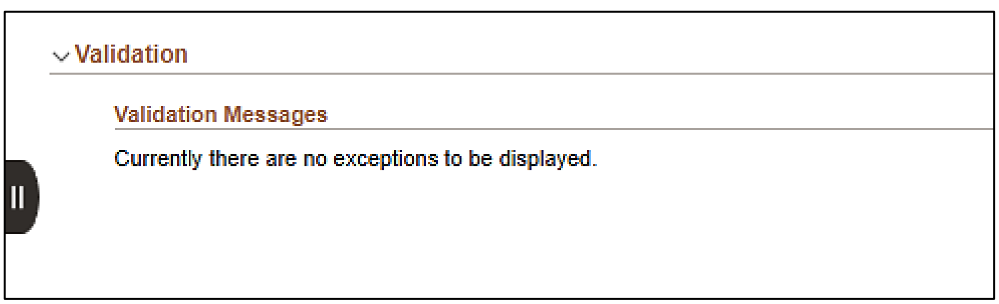
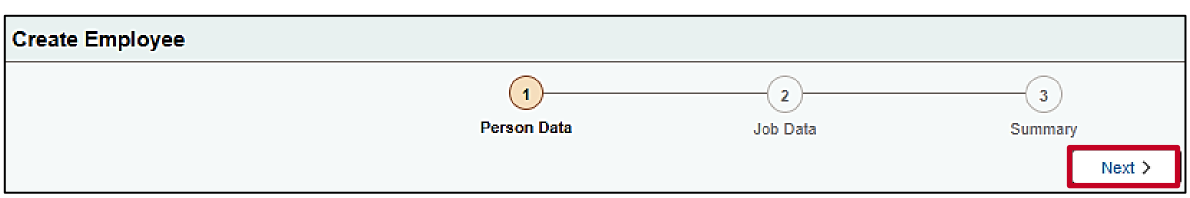


</td></tr>
<tr><td colspan="2">

The **VA Person Info** section displays.



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

Step	Action
43.	Enter the Employee ID of the retiree to be linked to the dependent in the **Linked Participant EmplID** field and tab out of the field. 
	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 under **Job Aids** in **Learning**.
44.	Click the **Validation** tab. 
The **Validation** section displays. 	
45.	Click the **Next** button on the right side of the page at the top. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

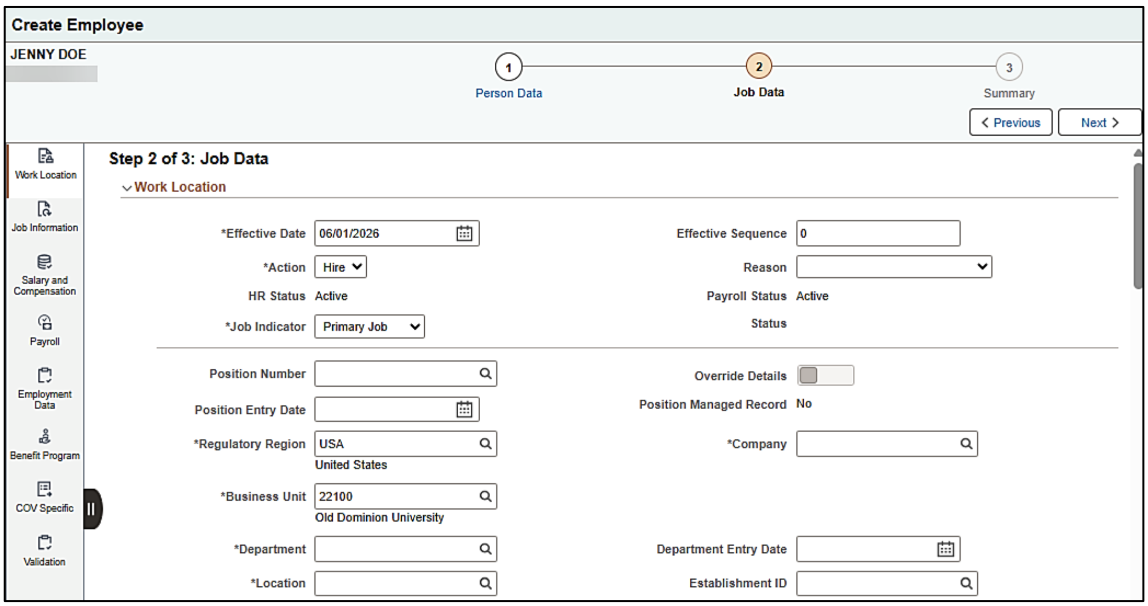
This is the step where information entered for the employee’s Personal Data is validated. If there is any missing required information, Cardinal will generate an alert.

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.

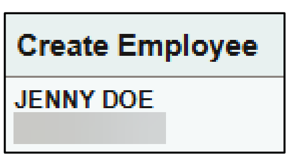
</td></tr>
<tr><td colspan="2">

The **Create Employee** (**Step 2 of 3: Job Data**) page displays with the **Work Location** section displayed by default.



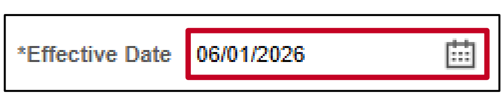
</td></tr>
<tr><td></td><td>

Cardinal will auto-assign the Employee ID Number for the dependent. Make note of the Employee ID Number for future use.



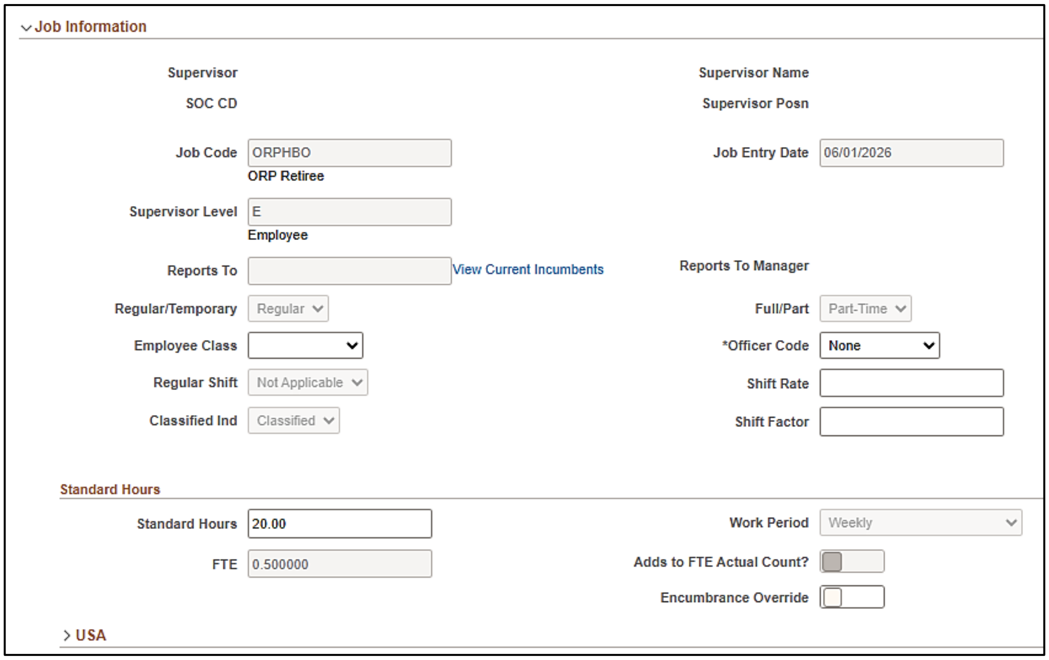
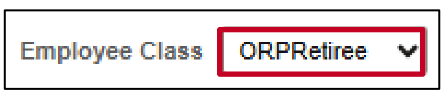
</td></tr>
<tr><td>46.</td><td>

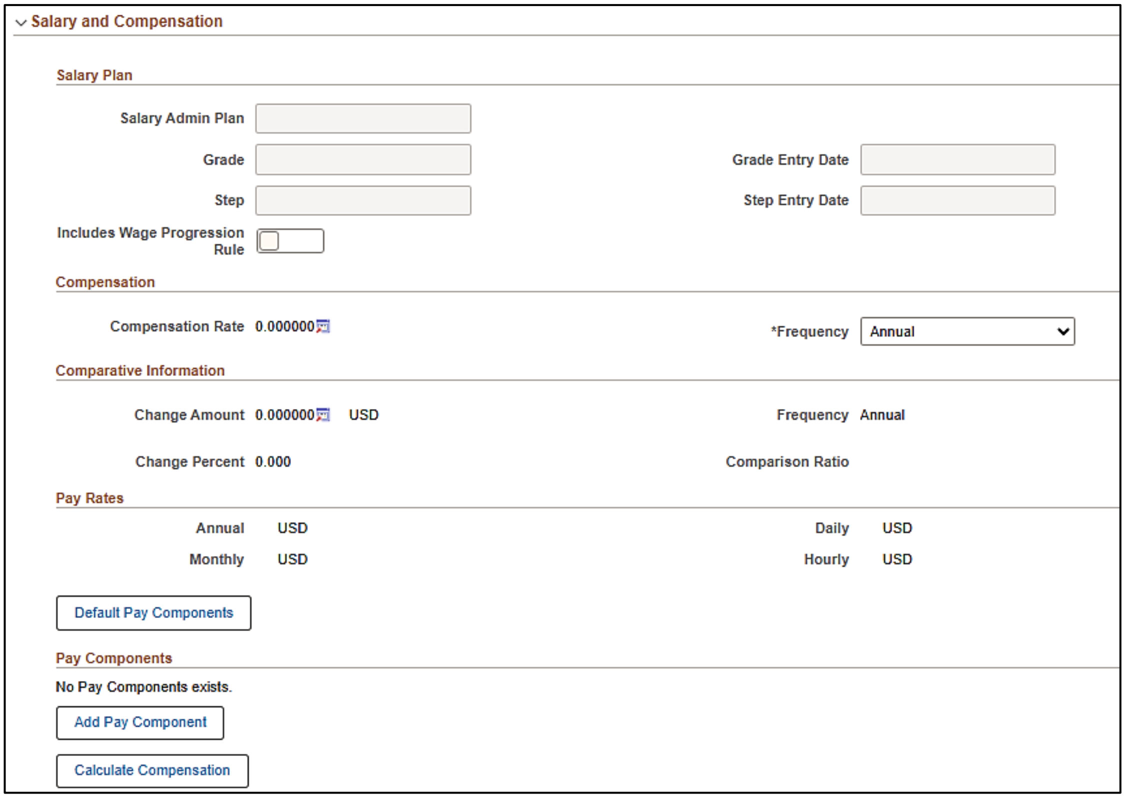
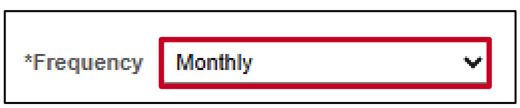
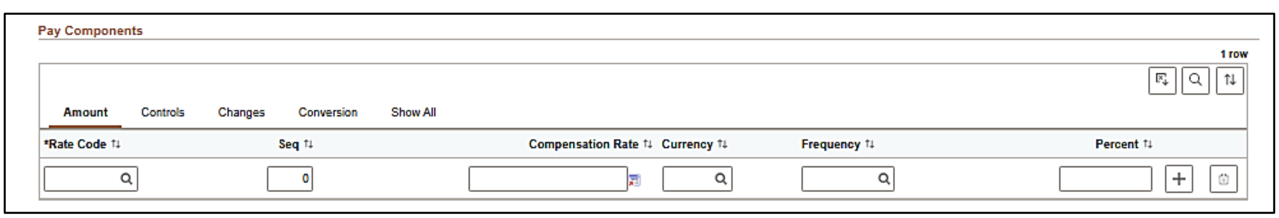
The **Effective Date** field defaults to the date entered on the **Create Employee** page. Update to the first of the month of eligibility as needed.

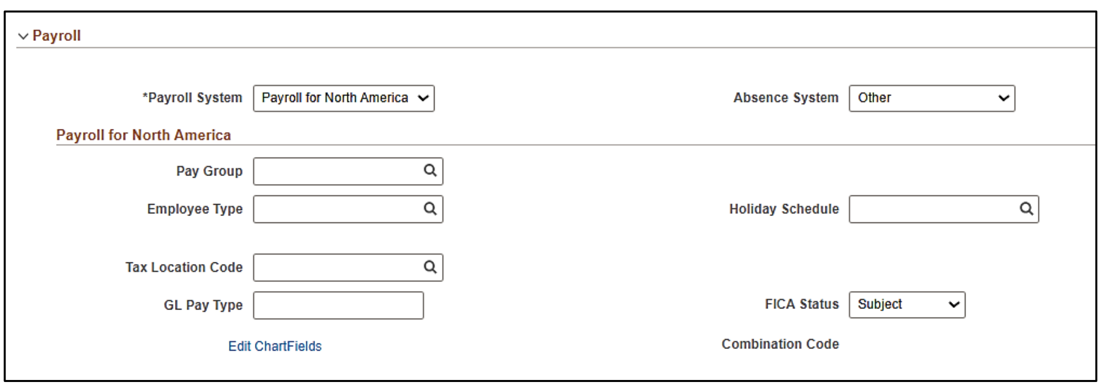
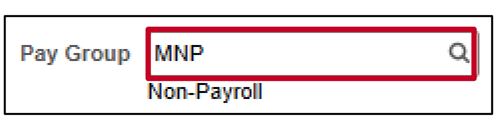


</td></tr>
</table>

Step	Action
47.	The **Action** field defaults to "Hire" and no other selections are available. 
48.	Click the **Reason** dropdown button and select the applicable retiree type. In this example, "Hire ORP Ret" has been selected. 
	If a warning message displays, review for accuracy and click the **OK** button. 
49.	Enter the retiree Position Number in the **Position Number** field ("Company Code + Retiree Type + 00"). In this example, "ODUORP00" has been selected. 
	The remaining position related fields in this section will auto-populate once the Position Number is entered in the **Position Number** field.
50.	Click the **Job Information** tab. 

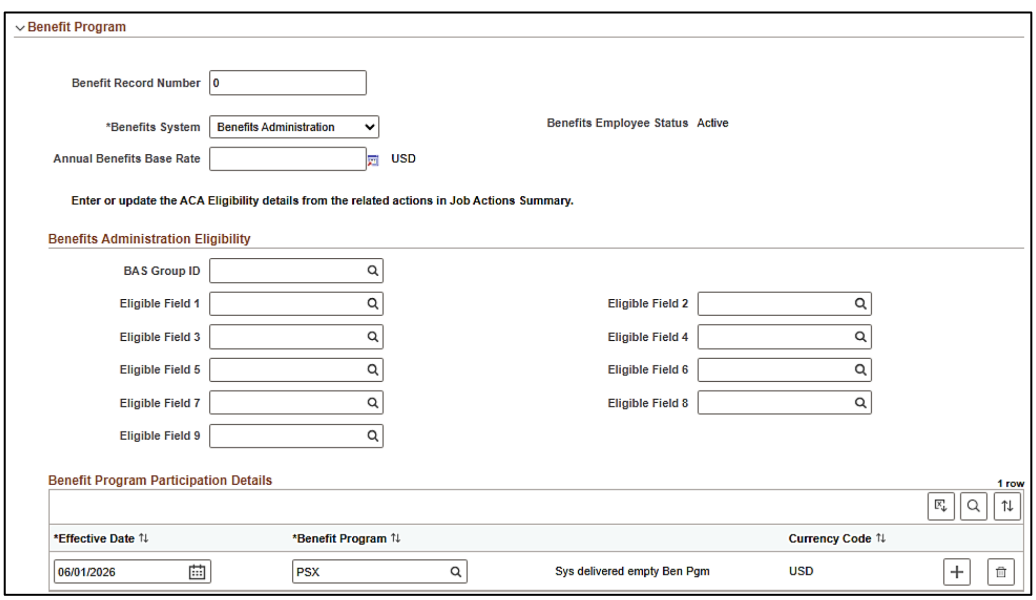
Step	Action
	The **Job Information** section displays. 
51.	Click the **Employee Class** dropdown button and select the applicable Employee Class. In this example “ORPRetiree” has been selected. 
52.	Click the **Salary and Compensation** tab. 

Step	Action
	The **Salary and Compensation** section displays. 
53.	Click the **Frequency** Look up icon and select “Monthly”. 
54.	Click the **Default Pay Components** button. 
	The **Pay Components** section displays. 

Step	Action
55.	Click the **Calculate Compensation** button. 
	This process refreshes displays on the page and updates tables within the Cardinal system leveraged by Payroll and other modules.
56.	Click the **Payroll** tab. 
The **Payroll** section displays. 	
57.	Click the **Pay Group Look up** icon and select “MNP” (Non-Payroll). 

Step	Action
58.	Enter the applicable Tax Location Code in the **Tax Location Code** field. 
	Other fields in the **Payroll for North America** section auto-populate based upon the selected Pay Group. Do not change.
59.	Click the **Benefit Program** tab. 

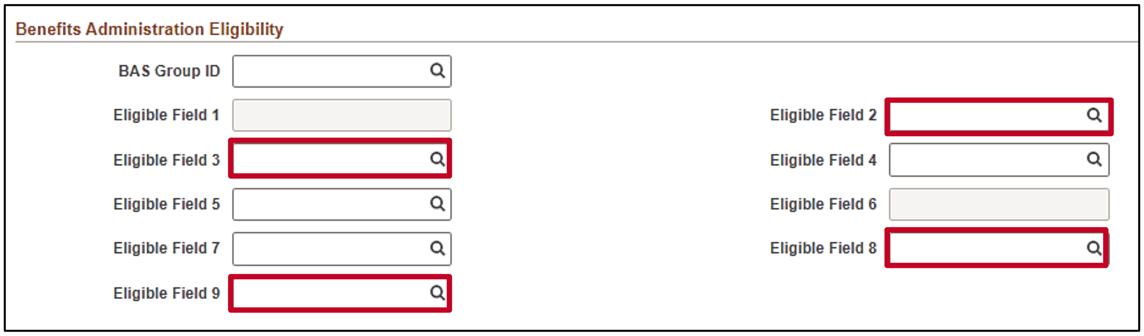
The **Benefit Program Participation** section displays.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>60.</td><td>

Scroll down to the **Benefits Administration Eligibility** section and complete the following fields:

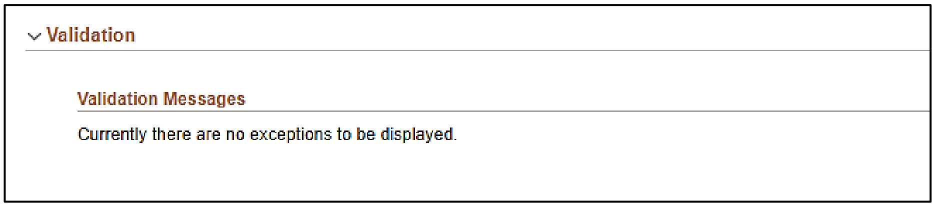
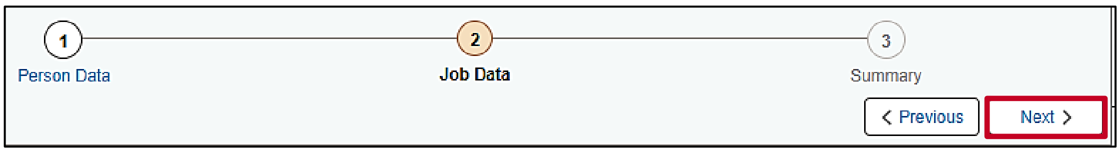
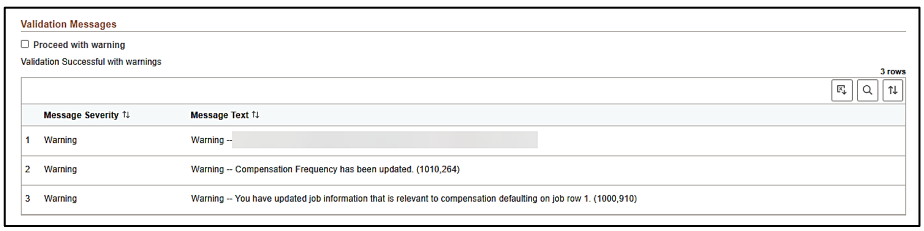
- **Elig Fld 2** (e.g., “007008000” for ORP)
- **Elig Fld 3** (“N”)
- **Elig Fld 8** (“12-12”)
- **Elig Fld 9** (e.g., “LS-GB”)

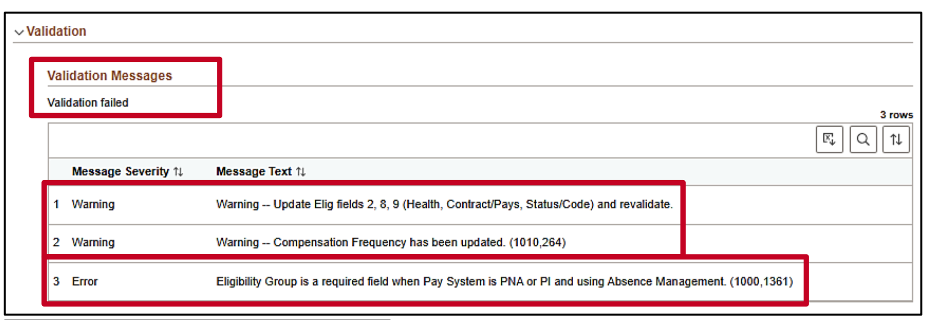


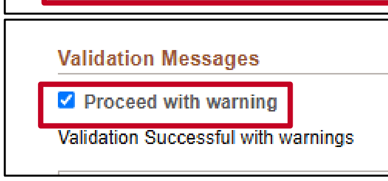
</td></tr>
<tr><td>61.</td><td>

Click the **Validation** tab.

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

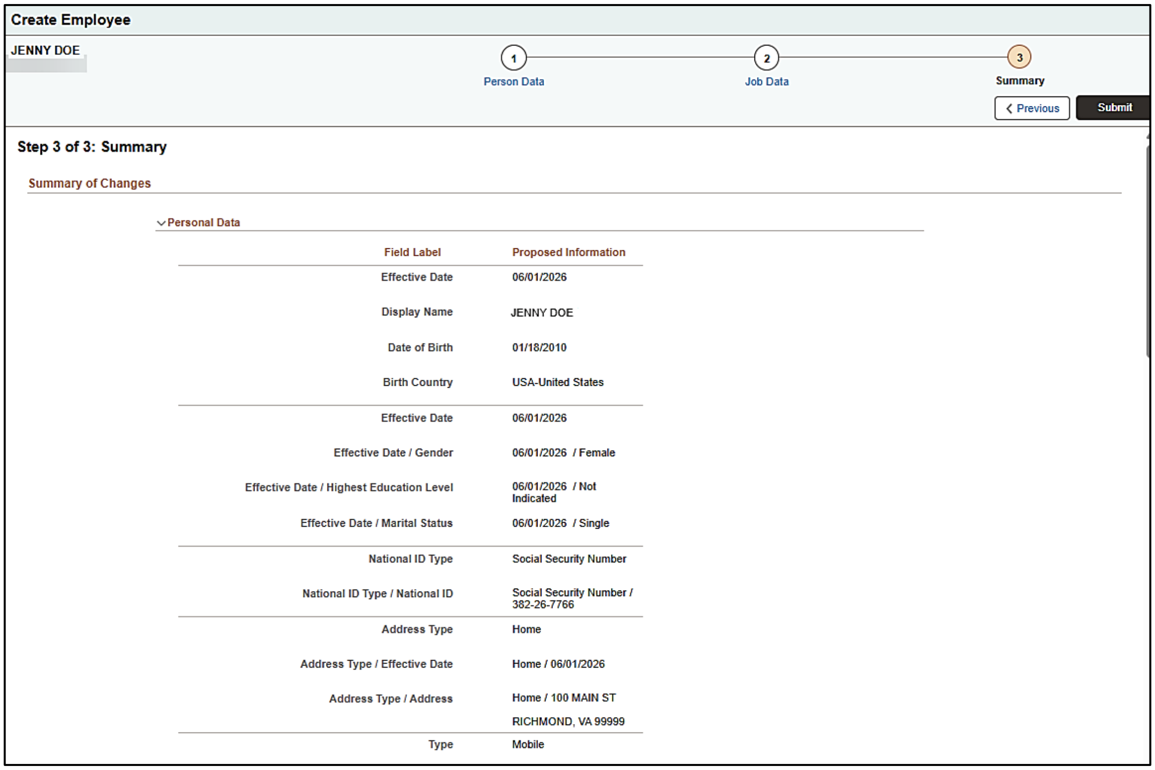
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Validation section displays.

</td></tr>
<tr><td>62.</td><td>Click the Next button.

</td></tr>
<tr><td colspan="2">The Validation Messages display.

</td></tr>
<tr><td>63.</td><td>Review the Validation Messages 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.


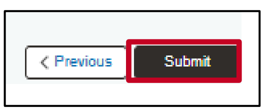

</td></tr>
</table>

Step	Action

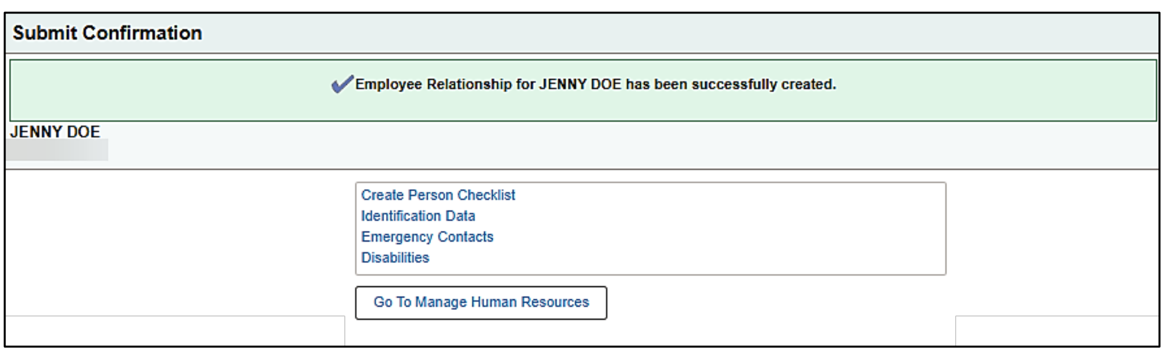
The **Create Employee** (**Step 3 of 3: Summary**) page displays.



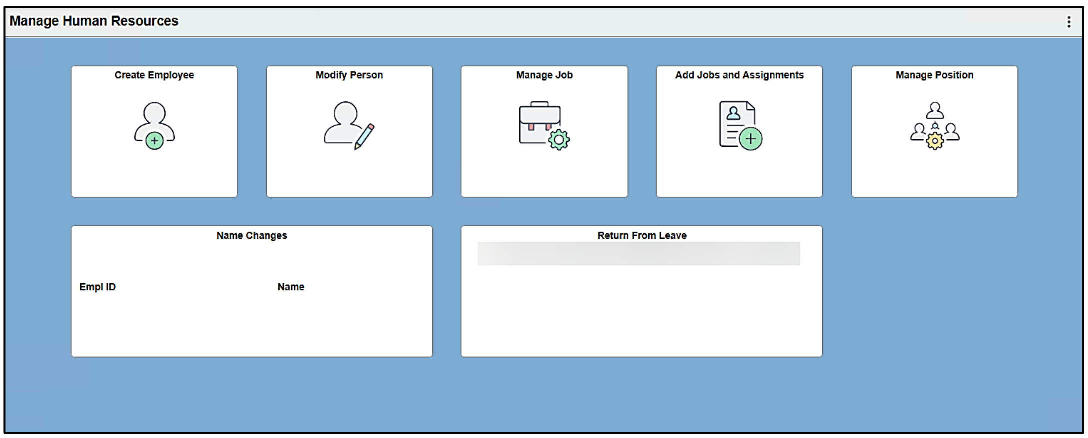
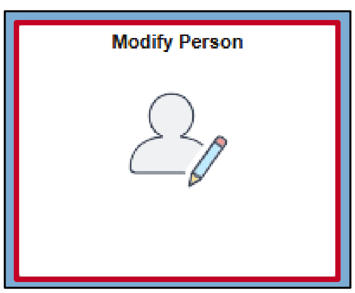
64.	Review the **Summary of Changes** section, and then click the **Submit** button.

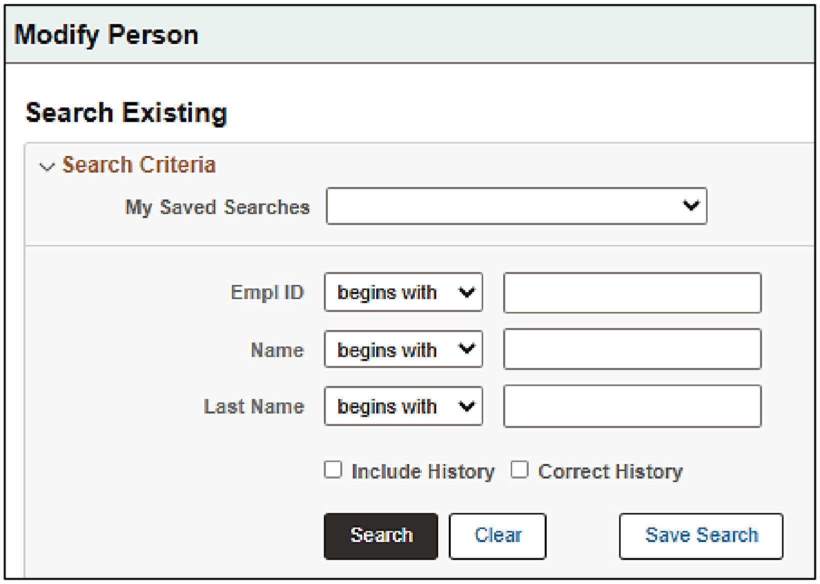
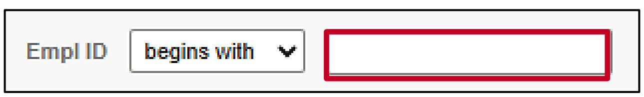
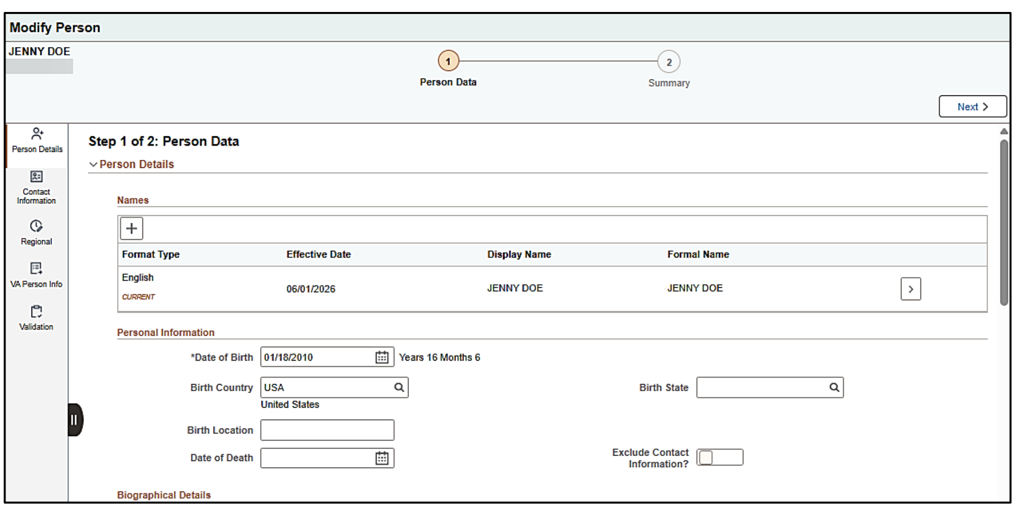


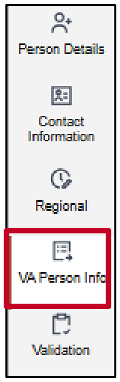
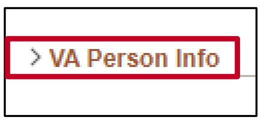
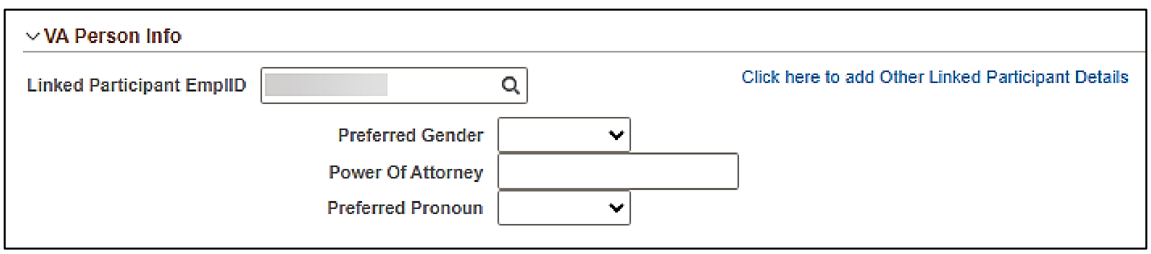
The **Submit Confirmation** page displays.

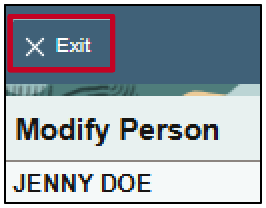
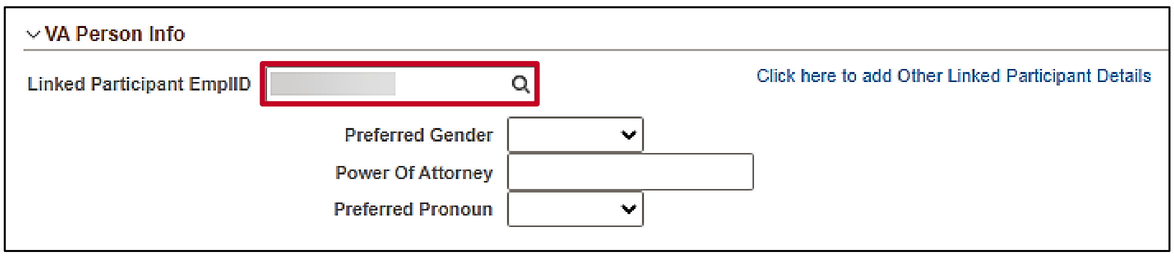
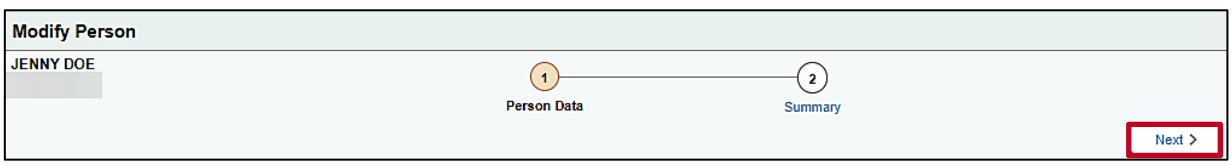
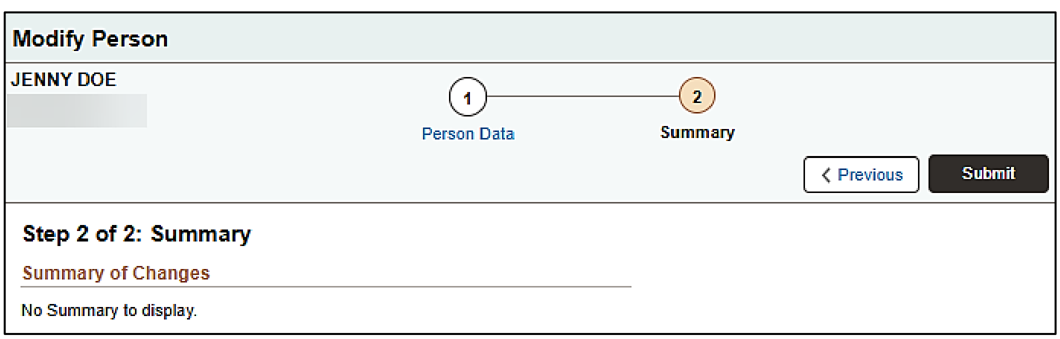
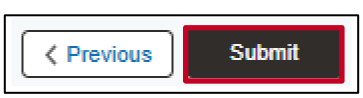


i	Once the record is saved, if anything is incorrect a help desk ticket must be entered to make the correction.

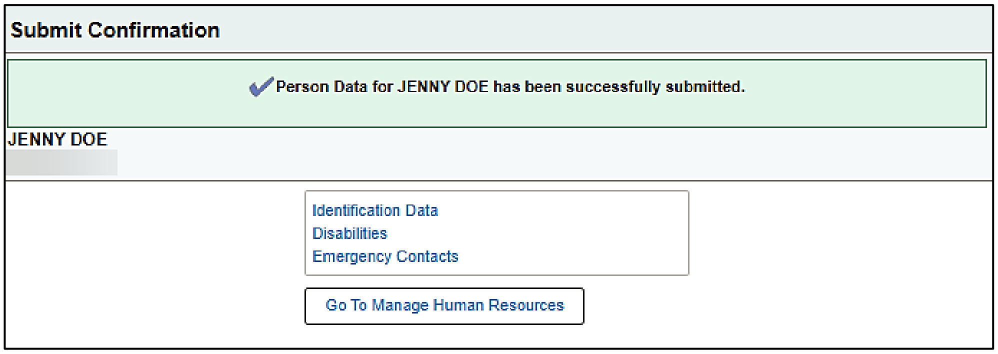
Step	Action
i	As a reminder, Cardinal has auto assigned the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for the next steps.
65.	Click the **Go To Manage Human Resources** link to return to the **Manage Human Resources** homepage. 
	The **Manage Human Resources** page displays. 
66.	Click the **Modify Person** tile. 

Step	Action
The **Modify Person Search Existing** page displays. 	
67.	Enter the Employee ID for the dependent in the **Empl ID** field. 
68.	Click the **Search** button. 
The **Modify Person** (**Step 1 of 2: Person Data**) page displays with the **Person Details** tab displayed by default. 	

Step	Action
69.	Click the **VA Person Info** tab. 
70.	Click the **VA Person Info** expand icon. 
The **VA Person Info** section displays. 	

Step	Action
71.	Validate that the retiree's Employee ID is populated in the **Linked Participant EmplID** field and click the **Exit** button. This process is complete.  If the retiree's Employee ID is NOT populated, enter it in the **Linked Participant EmplID** field, and continue to the next step. 
72.	Click the **Next** button. 
The **Modify Person** (**Step 2 of 2: Summary**) page displays. 	
73.	Click the **Submit** button. 

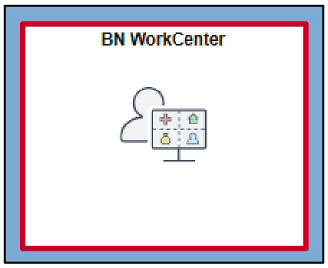
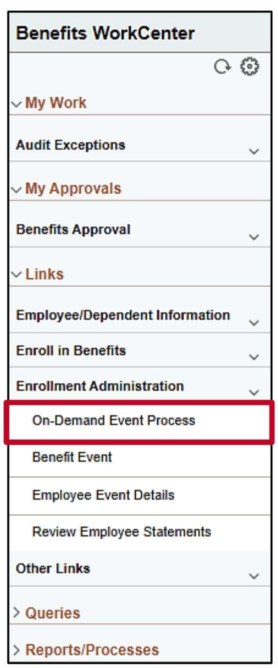
Step	Action
The **Submit Confirmation** page displays.	

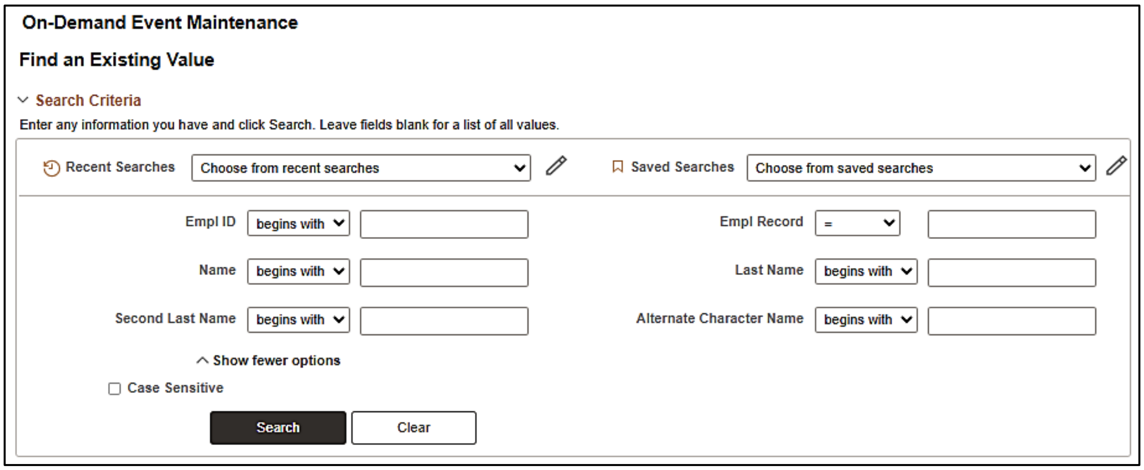
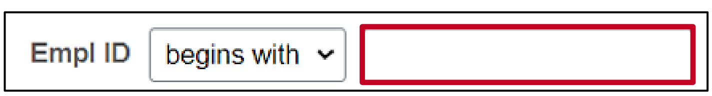
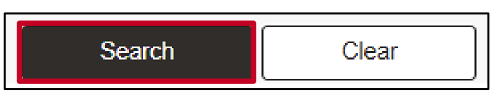


Enrolling the Dependent(s) in Benefits

The next step is to enroll the newly hired, youngest dependent in benefits, and add the retiree's spouse and any other eligible dependents. This transaction is completed by a BN Administrator after the Ben Admin process runs (every 4 hours).

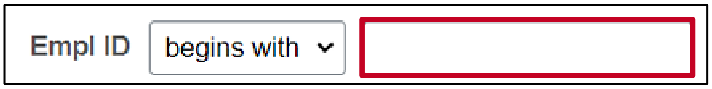
Note: Not all pages in this process are available from the **Benefits WorkCenter**. Therefore, this Job Aid may use both the **WorkCenter** and the **NavBar** to navigate to the applicable pages.

Step	Action
1.	Navigate to the **On-Demand Event Process** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of 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 > On-Demand Event Process** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

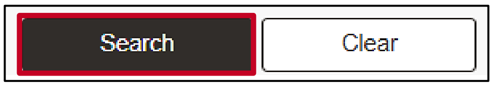
Step	Action
ℹ	Users can also access the **On-Demand Event Process** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Process**
	The **On-Demand Event Maintenance Find an Existing Value Search** page displays. 
ℹ	For more information pertaining 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**.
5.	Enter the retiree's Employee ID in the **Empl ID** field. **Note**: Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 
6.	Click the **Search** button. 
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**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>
Enter the dependent’s Employee ID in the Empl ID field.

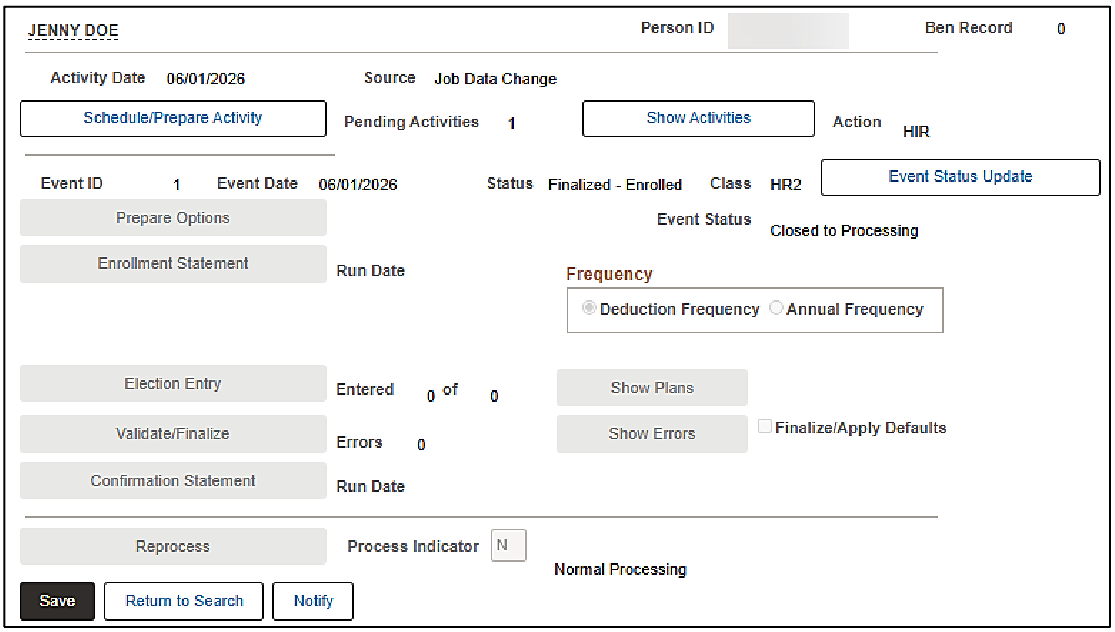
Note: Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.



</td></tr>
<tr><td>8.</td><td>
Click the Search button.

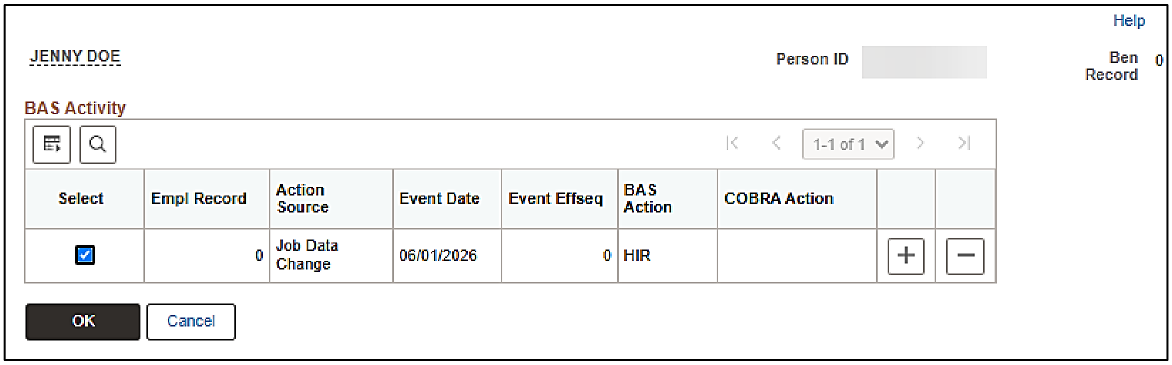
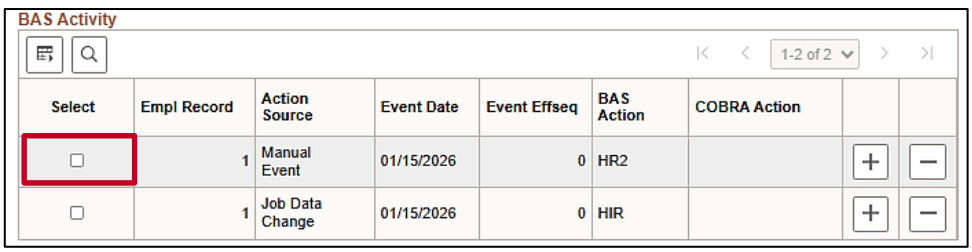
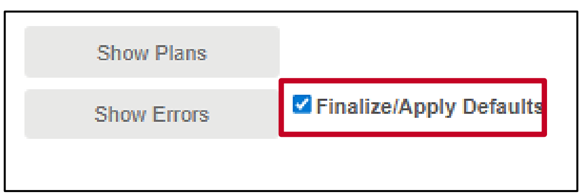
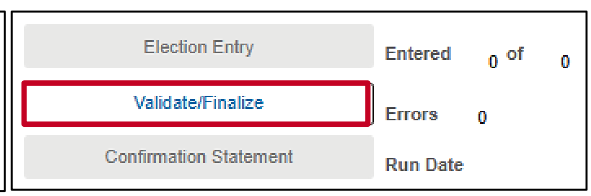
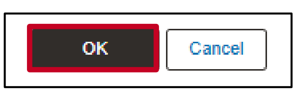


</td></tr>
<tr><td colspan="2">
The On-Demand Event Process page displays for the newly hired, youngest dependent.



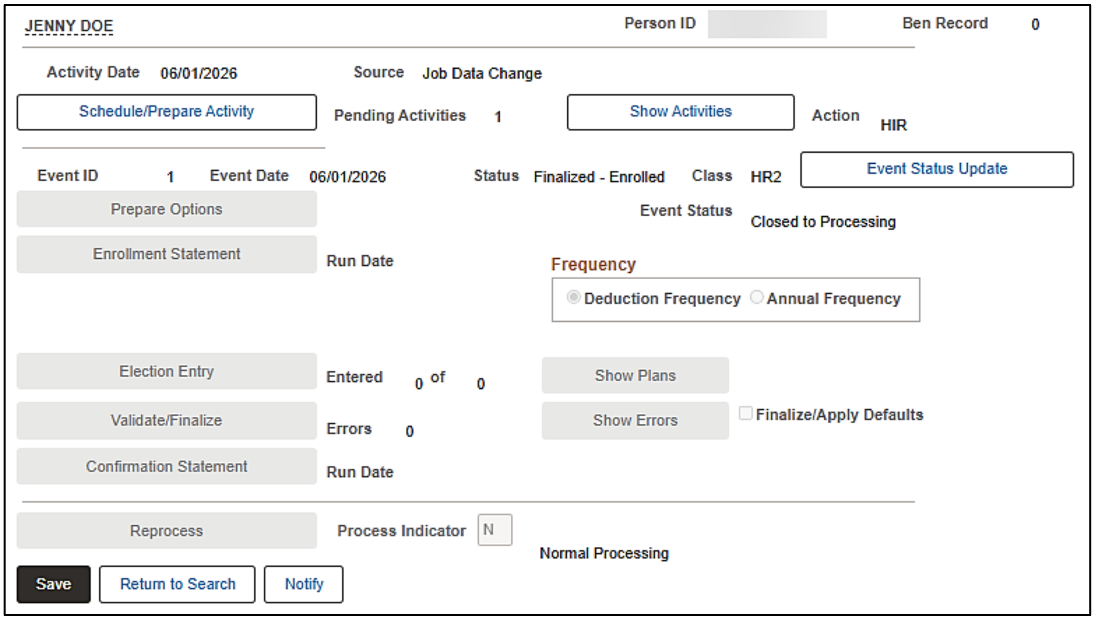
</td></tr>
<tr><td>9.</td><td>
Click the Show Activities button.

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

Step	Action
	The **BAS Activity** page displays in a pop-up window. 
	If the **BAS Activity** page displays an "HR2" event, the Benefits Administration process has not yet run. In this case, complete the "HR2" event first by clicking the **Schedule/Prepare Activity** button to manually run Ben Admin.   If the HR2 event does not go to "Prep None", select the **Finalize/Apply Defaults** checkbox option, and then click the **Validate/Finalize** button to complete the Ben Admin process.  
10.	Click the **OK** button. 

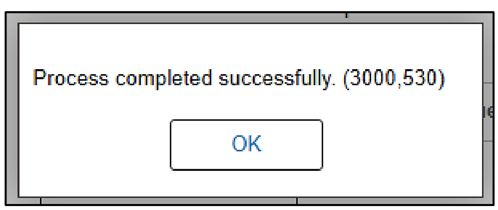
Step	Action

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

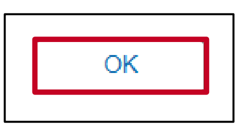


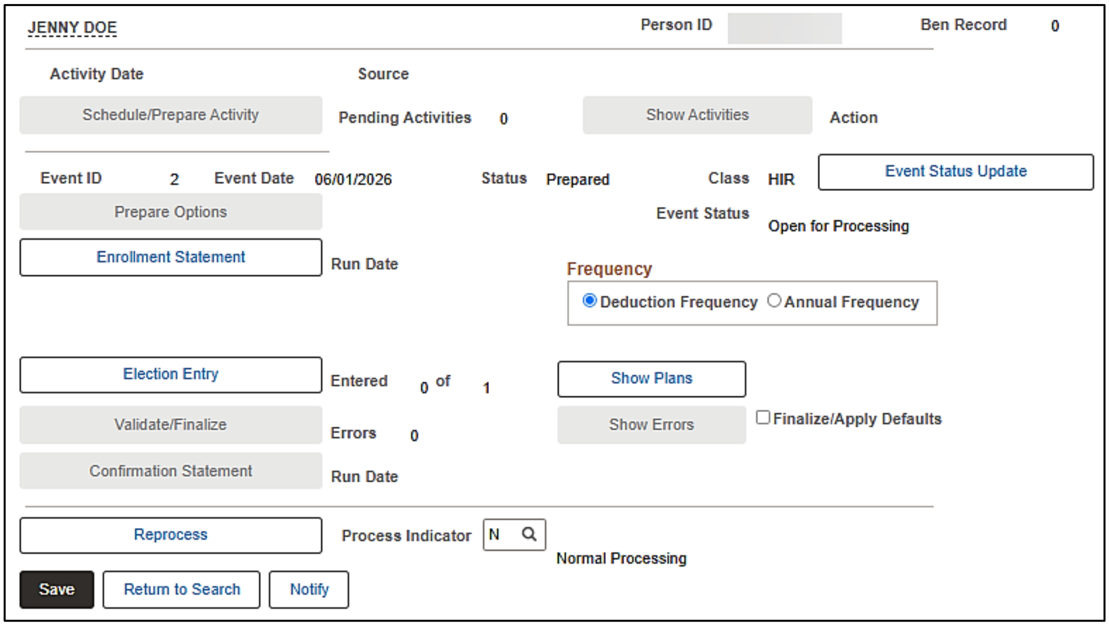
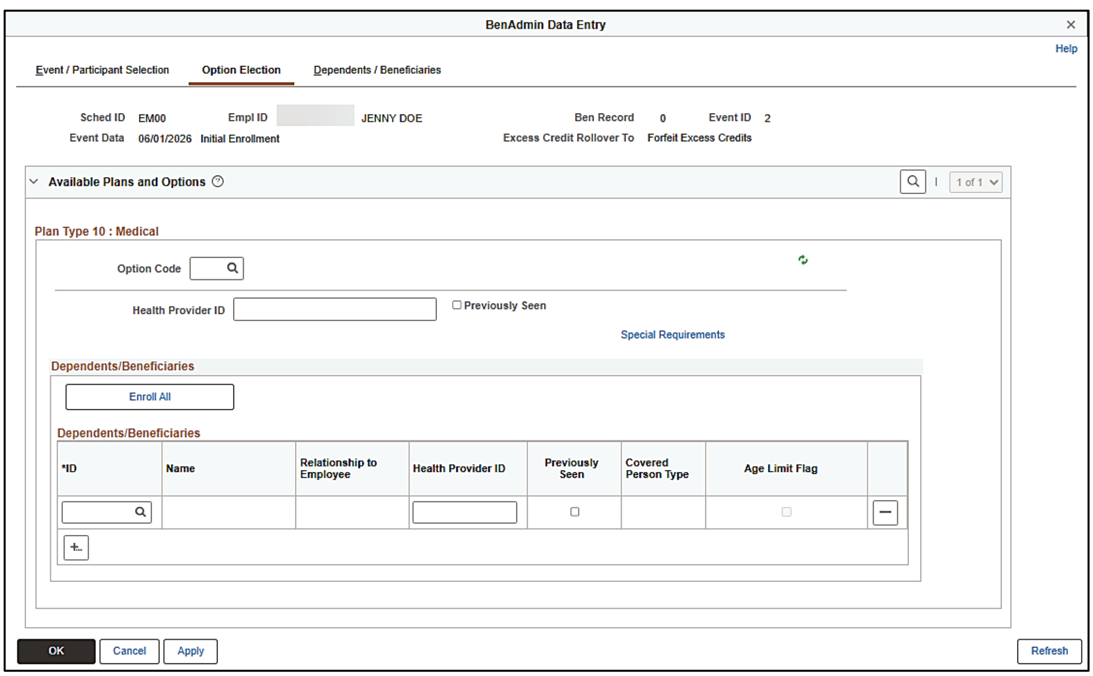
11. Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event.

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

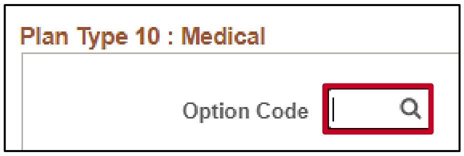


12. Click the **OK** button to close the message.

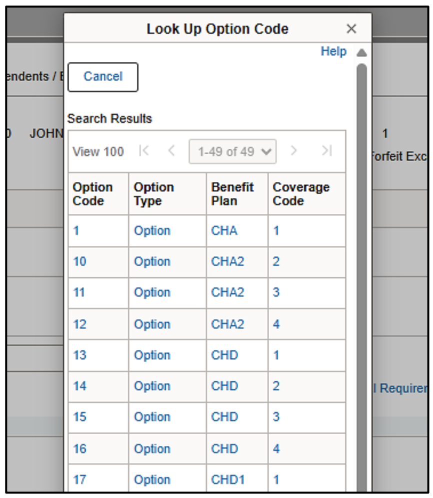


Step	Action
	The **On-Demand Event Process** page redisplays. 
13.	Click the **Election Entry** button. 
	The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default. 

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



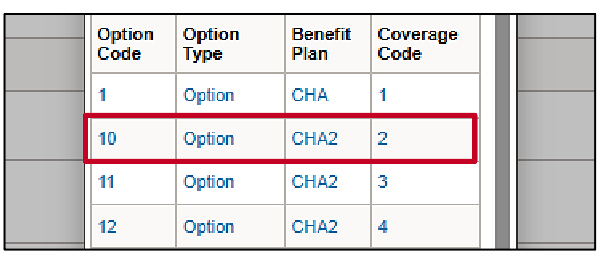
The **Look Up Option Code** page displays in a pop-up window.



Step	Action
15.	Select the Benefit Plan and Coverage Code indicated on the enrollment form submitted by the retiree. For this example, **Benefit Plan** “CHA2” with **Coverage Code** “2” is selected because there is no “Child + Parent” option.

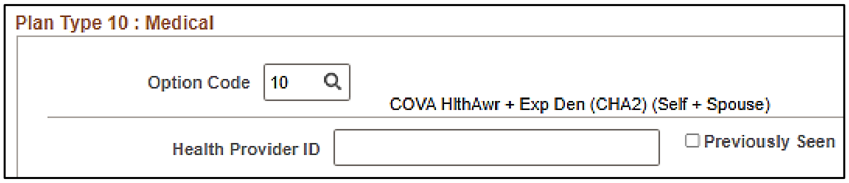
Note: The Coverage Codes are:

- 1 – Single Coverage
- 2 – Self + Spouse
- 3 – Self + Child
- 4 – Family (Employee + 2 or More Dependents)

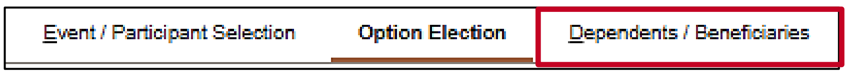


Step **Action**

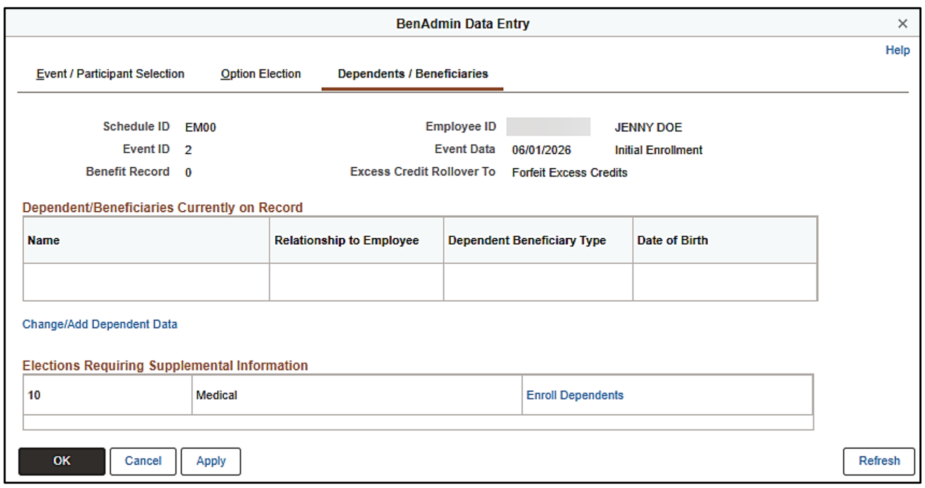
The **Plan Type 10: Medical** section redisplays with the selected **Option Code** displayed.



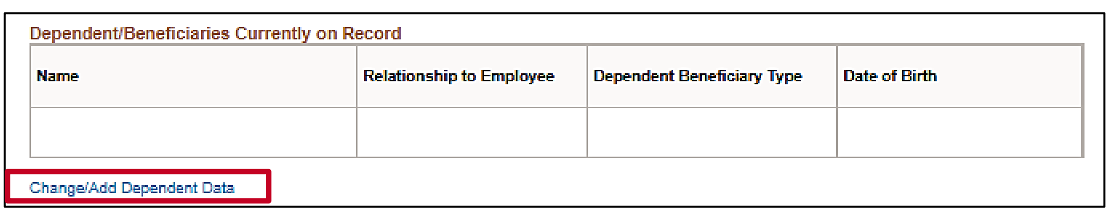
16. Click the **Dependents / Beneficiaries** tab.

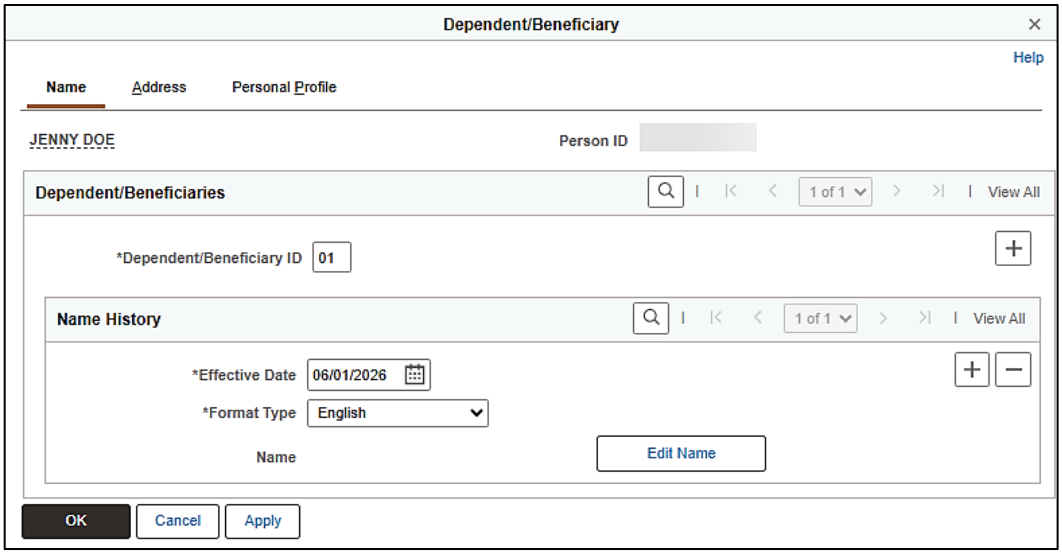
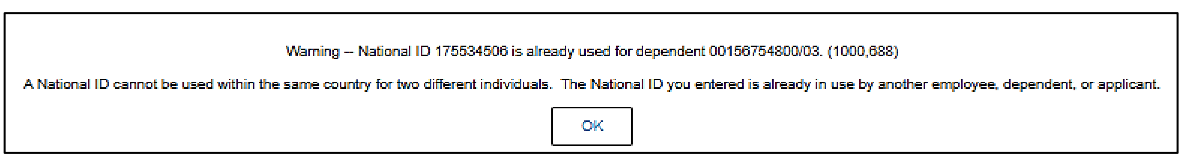
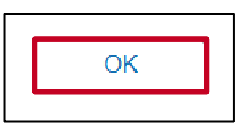


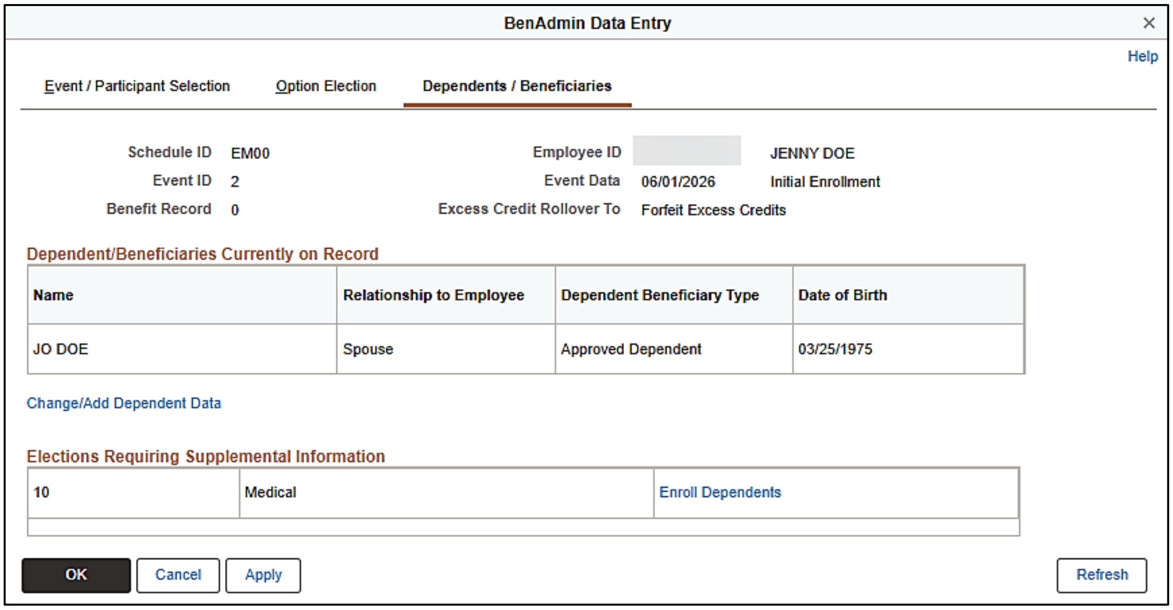
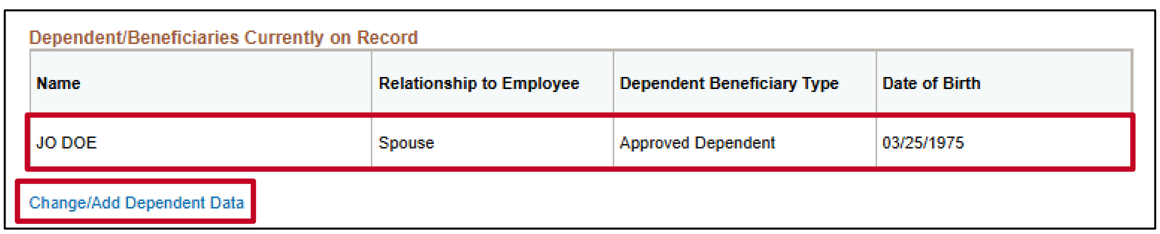
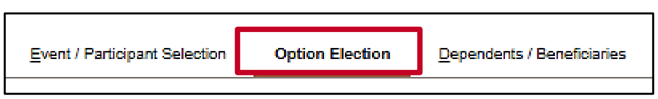
The **Dependents / Beneficiaries** page displays.



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

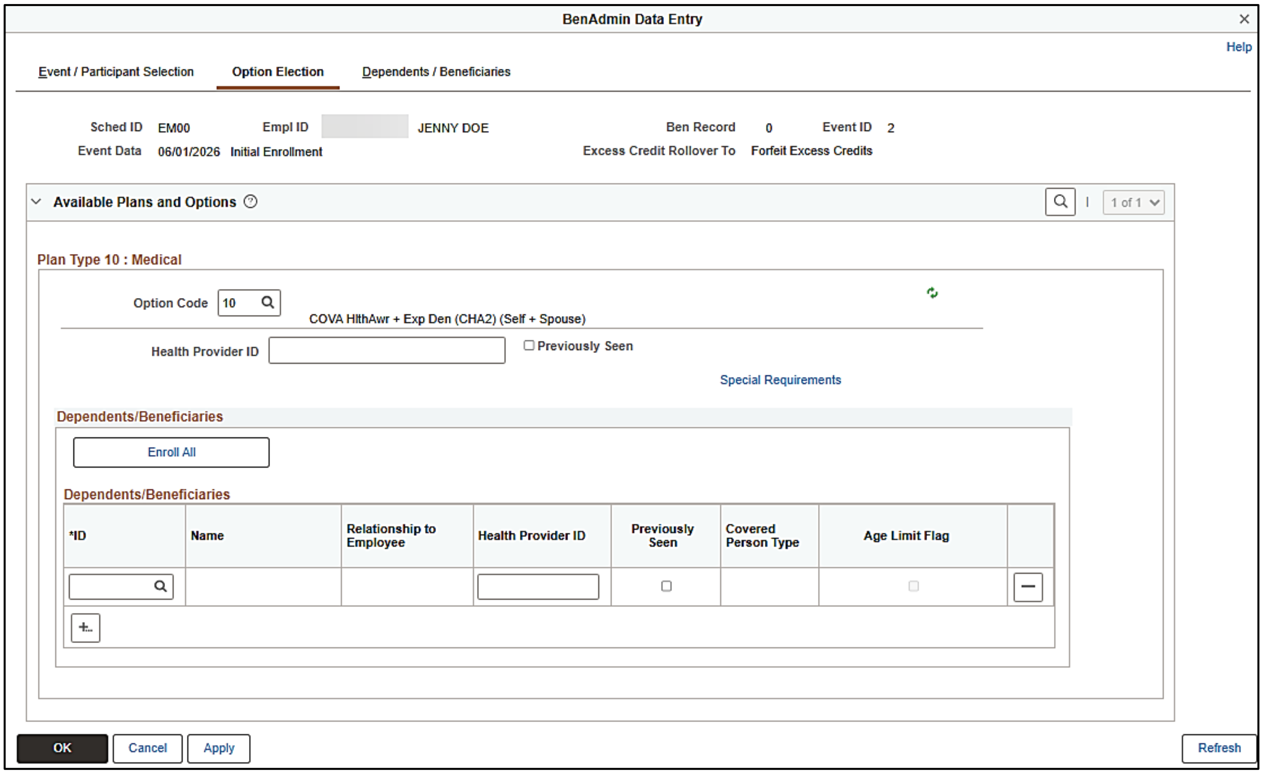


Step	Action
	The **Dependent/Beneficiary** page displays in a pop-up window. 
18.	Add all applicable dependents to the youngest dependent's record with the information gathered previously in **Step 10** of the [Hire the Youngest Dependent as an Employee] section of this Job Aid. Be sure to visit all three tabs – **Name**, **Address**, and **Personal Profile**. For this scenario, the youngest dependent's parent (spouse of the retiree) is added. There are no other siblings.
ℹ	When entering dependents in this scenario, the youngest dependent's parent must be entered as a "Spouse", and the sibling entered a "Child" in the **Relationship to Employee** field. The **Dependent/Beneficiary Type** must be changed to "Approved Dependent" for each dependent.
	A Warning message appears when entering the National ID of the dependents because they were previously associated with the retiree's record. 
19.	Click the **OK** button to close the message. 

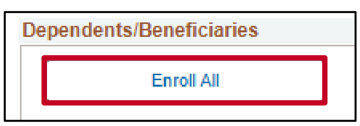
Step	Action
	Once the dependent(s) information is entered, the **BenAdmin Data Entry** page redisplays. 
20.	Review the **Dependent/Beneficiaries Currently on Record** section for accuracy. If it is incorrect, click the **Change/Add Dependent Data** link and make the necessary corrections. 
21.	Click the **Option Election** tab. 

Step	Action

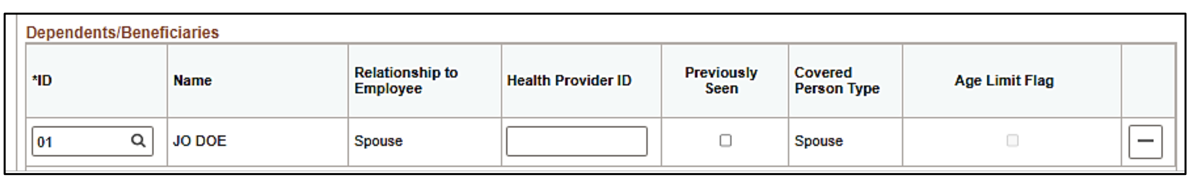
The **Option Election** page displays.



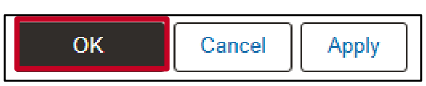
22. Click the **Enroll All** button.



The enrolled dependent(s) display(s) in the **Dependents/Beneficiaries** section.

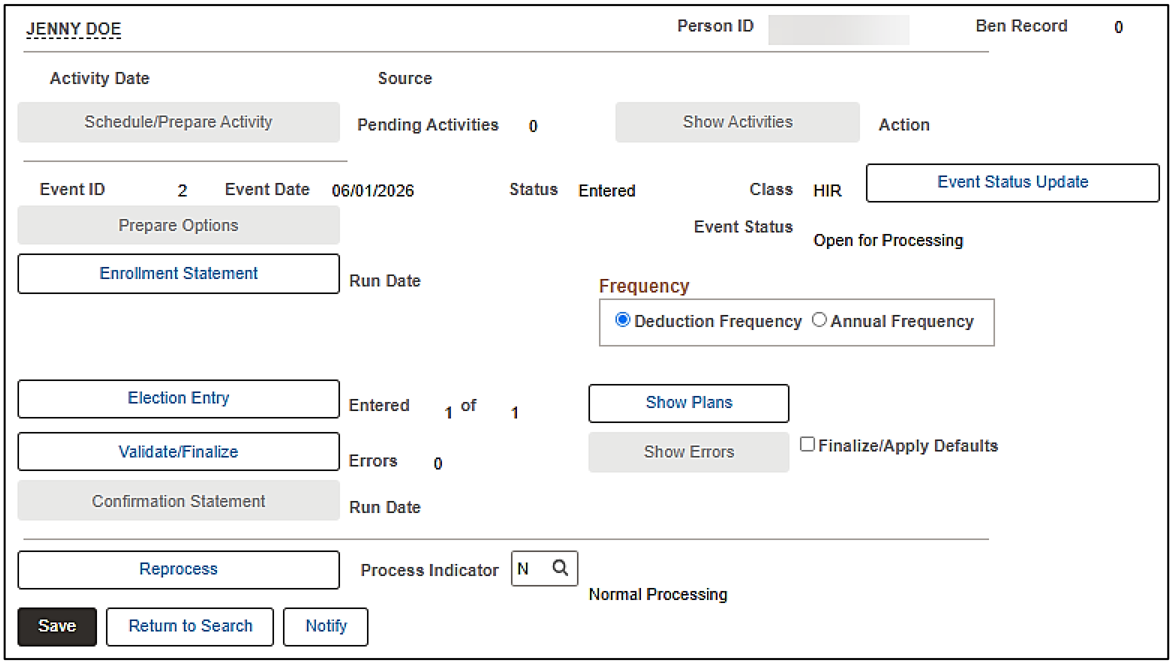


23. Click the **OK** button.

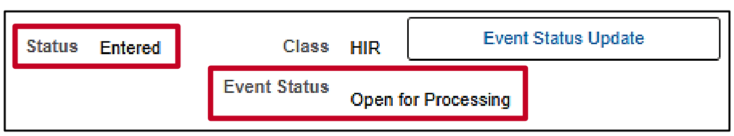


Step	Action

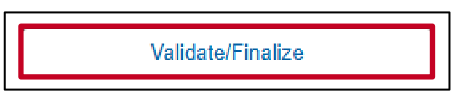
The **On-Demand Event Process** page redisplays.



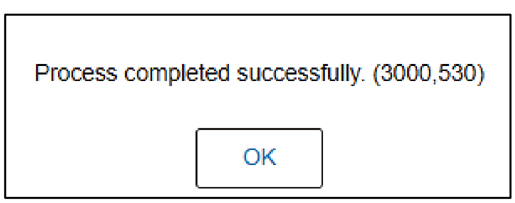
24. Confirm that the **Status** field is "Entered" and that the **Event Status** field is "Open for Processing".

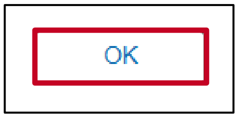


25. Click the **Validate/Finalize** button.



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



Step	Action
26.	Click the **OK** button to close the message. 
The **On-Demand Event Process** page redisplays.	
27.	Confirm that the **Status** field is "Finalized – Enrolled" and the **Event Status** field is "Closed to Processing".