

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.

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Revision History

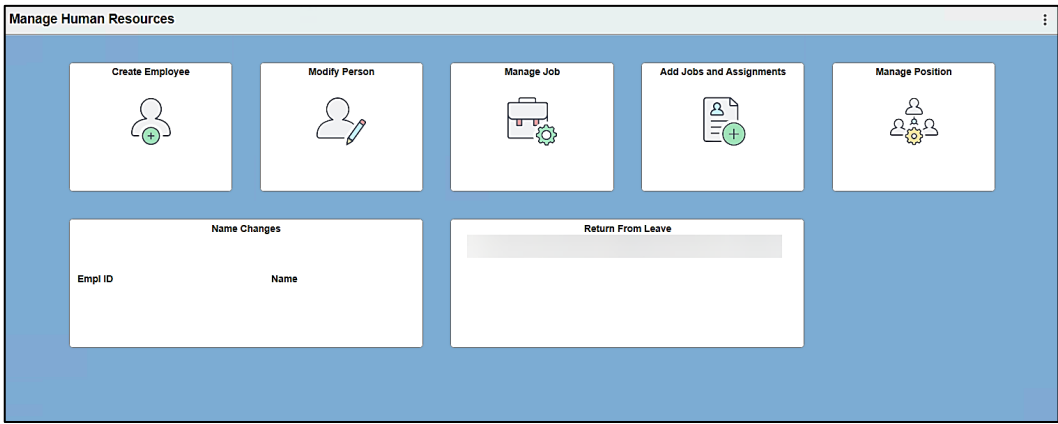
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
7/15/2026	Notes added pertaining specifically to retirees declining medical coverage permanently, including updates to Eligibility Field 5, no Election Entry, and no updates to the Benefits Personal Data page.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

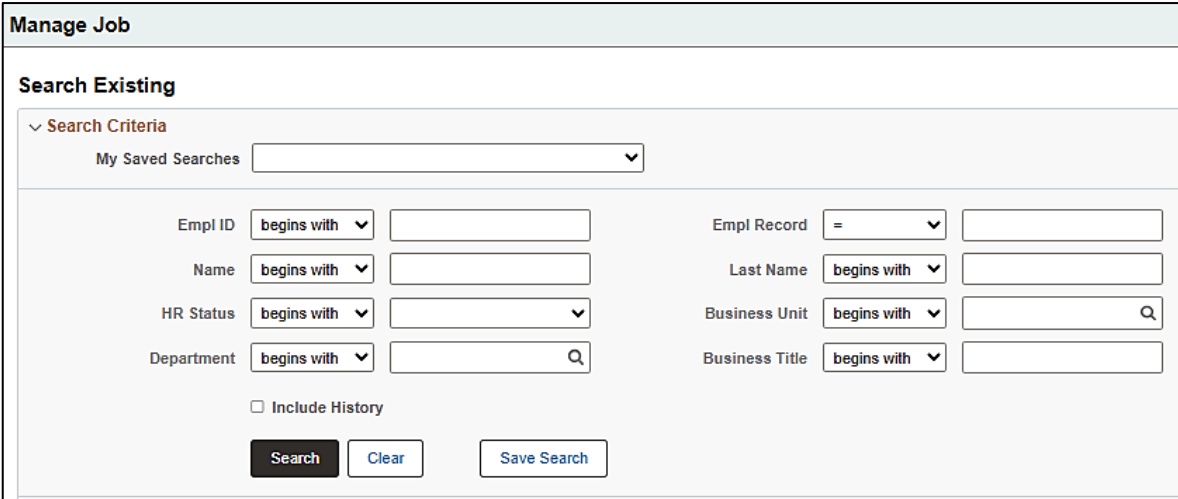
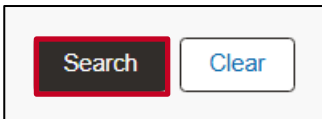
Scenario 1 – Employee Retires (under 65) with Self + Spouse Coverage

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

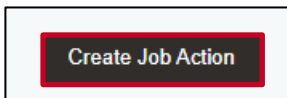
Job Actions Summary														
														Create Job Action
														Update/Display Include History
Job Actions Summary														
Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business 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		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



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.

Cancel
Create Job Action
Continue

Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.

*Effective Date

Effective Sequence

*Action

*Reason

Step	Action
7.	Update the effective date as needed using the Effective Date Calendar icon. *Effective Date 05/26/2026 
	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). *Action RET  Retirement *Reason 
9.	Click the Reason field dropdown button and select the applicable reason ("ORP" has been selected for this example). *Action RET  Retirement *Reason ORP  Retirement-ORP
	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. Continue

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

The **Work Location** page displays.

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

Retirement - Retirement-ORP

Active

Next >

Work Location

● Visited

Job Information

○ Not Started

Salary and Compensation

○ Not Started

Payroll

○ Not Started

Employment Data

○ Not Started

Benefit Program

○ Not Started

Validate

○ Not Started

Summary

○ Not Started

Work Location

Effective Date 05/26/2026

HR Status Inactive

Effective Sequence 0

Payroll Status Retired

*Job Indicator Primary Job

Position Number

Position Entry Date 06/01/1990

Regulatory Region USA

Company DLI

Dept of Labor and Industry

Business Unit 18100

Dept of Labor and Industry

Department 18100

DEPT OF LABOR AND INDUSTRY

Department Entry Date 04/01/1988

Location RICH

Dept of Labor and Industry

Establishment ID DOLI

Dept of Labor and Industry

Date Created 06/19/2026

Last Start Date 04/01/1988

Termination Date 05/25/2026

Override Last Date Worked

Last Date Worked 05/25/2026

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

Work Location

Effective Date 06/20/2026

HR Status Inactive

Effective Sequence 0

Payroll Status Retired

*Job Indicator Primary Job

- Click the **Validate** tab.

Work Location

● Visited

Job Information

○ Not Started

Salary and Compensation

○ Not Started

Payroll

○ Not Started

Employment Data

○ Not Started

Benefit Program

○ Not Started

Validate

● Visited

Summary

○ Not Started

Step	Action
	The Validate page displays. Validate Effective Date 05/26/2026 Effective Sequence 0 Validation Use the Validate button to verify the entered data. This is an optional step but it is recommended to validate details and review warning and error messages Messages Currently there are no exceptions to be displayed.
13.	Review the Validate page and click the Validate button. Validate 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. Validation Validation Messages Validation Successful with warnings ☒ Proceed with warning
	The Validate page refreshes. Validate Effective Date 05/26/2026 Effective Sequence 0 Validation Use the Validate button to verify the entered data. This is an optional step but it is recommended to validate details and review warning and error messages Messages Validation Successful

Step

Action

14.

After validation, click the **Summary** tab.

Work Location

● Visited

Job Information

○ Not Started

Salary and Compensation

○ Not Started

Payroll

○ Not Started

Employment Data

○ Not Started

Benefit Program

○ Not Started

Validate

● Visited

Summary

● Visited

The **Summary** page displays.

Retirement - Retirement-ORP

Work Location

● Visited

Job Information

○ Not Started

Salary and Compensation

○ Not Started

Payroll

○ Not Started

Employment Data

○ Not Started

Benefit Program

○ Not Started

Validate

● Visited

Summary

● Visited

Summary

Effective Date 05/26/2026

Effective Sequence 0

Summary of Changes

Field Label	Proposed Information	Current Information
Position Number	DLI00315-DLI00059	DLI00315-DLI00059
HR Status ●	Inactive	Active
Payroll Status ●	Retired	Active
Termination Date ●	05/25/2026	Not Available
Last Date Worked ●	05/25/2026	Not Available
Changes Made ●		

15.

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

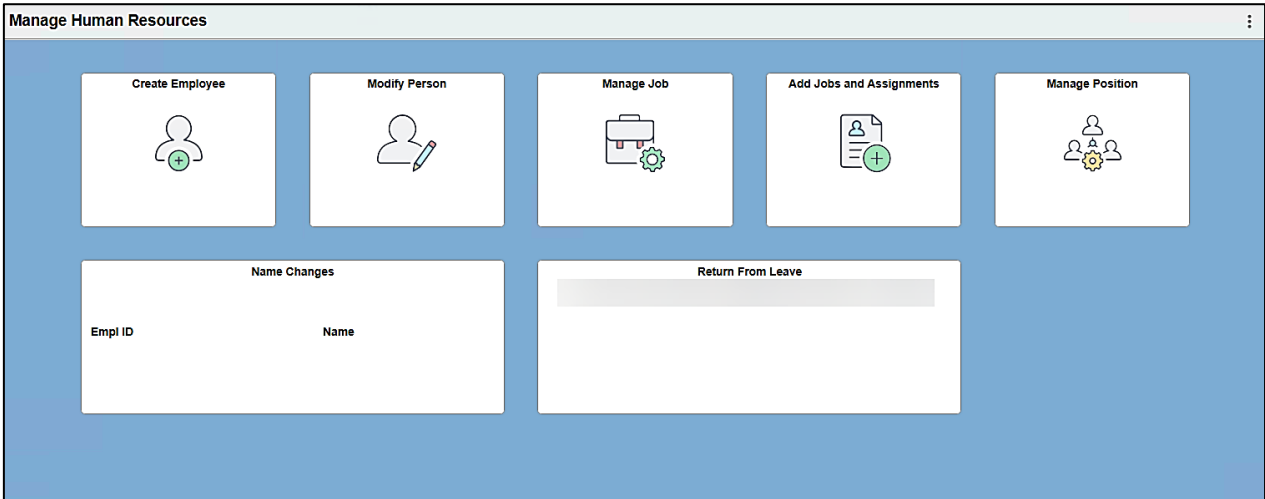
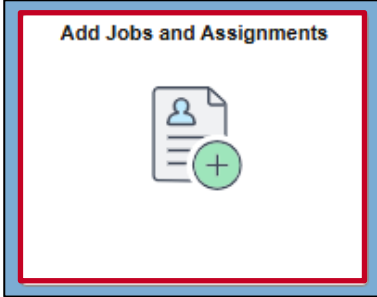
< Previous

Submit

Step	Action
	The Submit Confirmation page displays confirming the change. Submit Confirmation  The Retirement for has been successfully created. Job Actions Summary Go To Search Results
	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
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The **Organizational Relationships Search Existing** page displays.

Organizational Relationship

Search Existing

▼ **Search Criteria**

My Saved Searches ▼

Empl ID begins with ▼

Name begins with ▼

Last Name begins with ▼

Search
Clear
Save Search

[Basic Search](#)



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**.

- 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.

Empl ID begins with ▼

- Click the **Search** button.

Search
Clear

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

Organizational Relationship

Add Organizational Relationship

▼ **Relationship - Employee**

Instance Nbr 0

HR Status Inactive

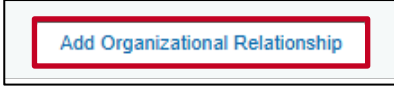
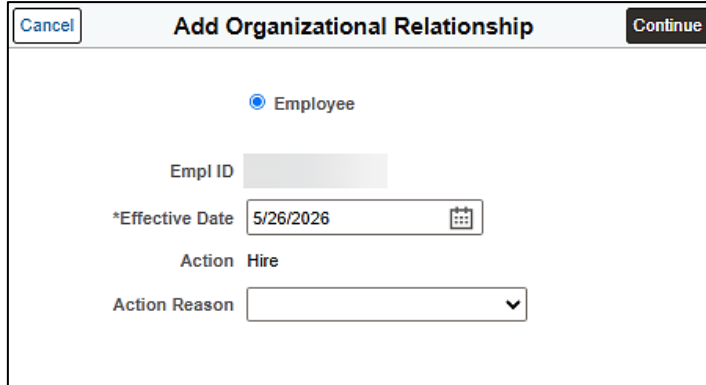
Payroll Status Retired

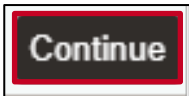
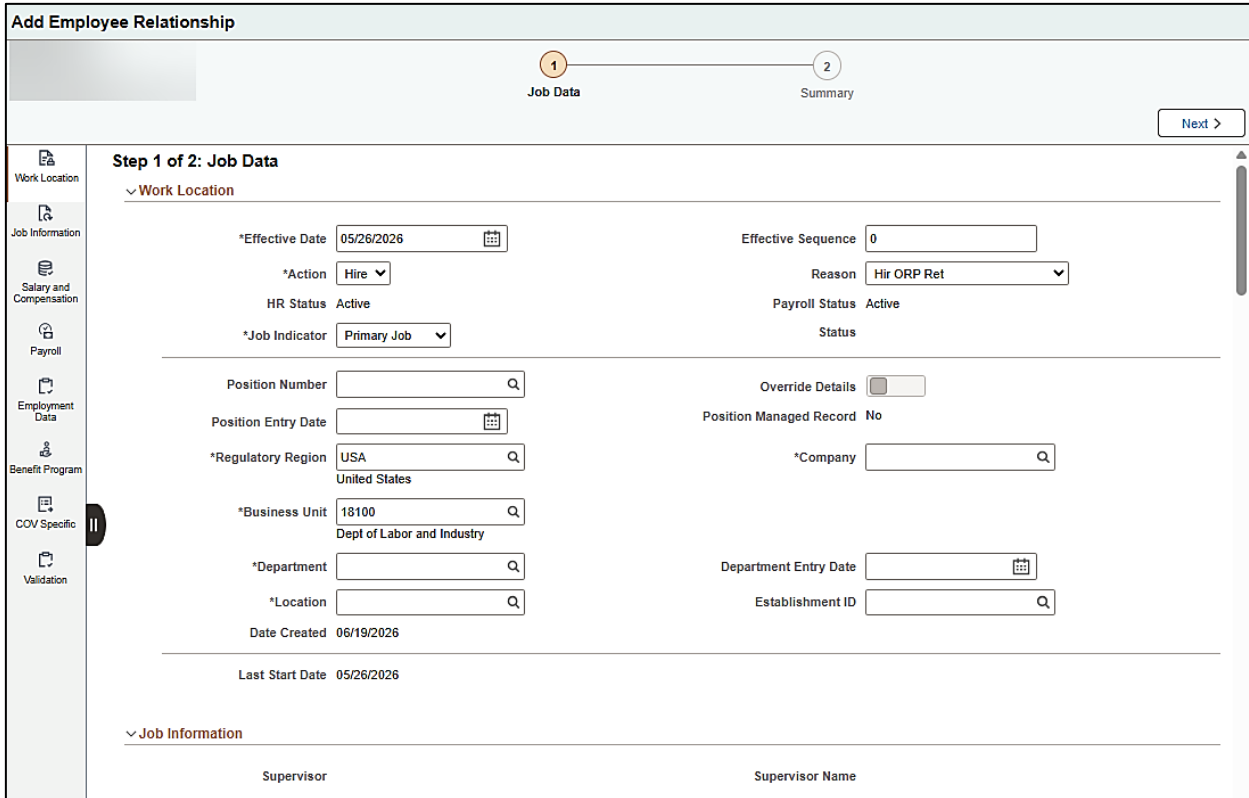
Last Hire Date 04/01/1988

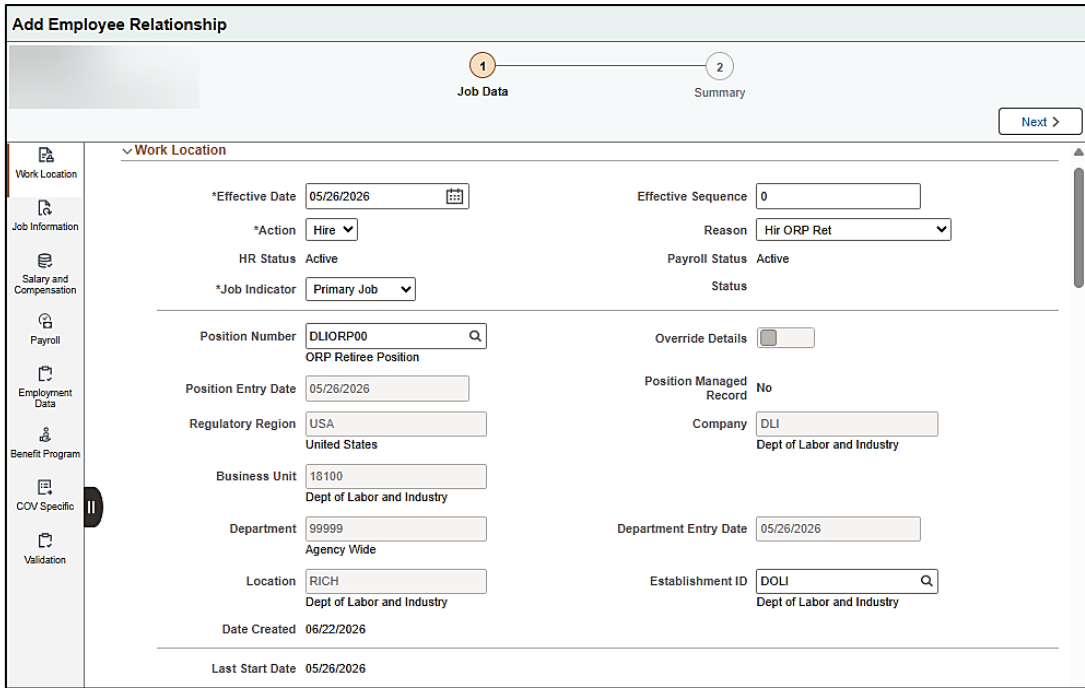
Termination Date 05/25/2026

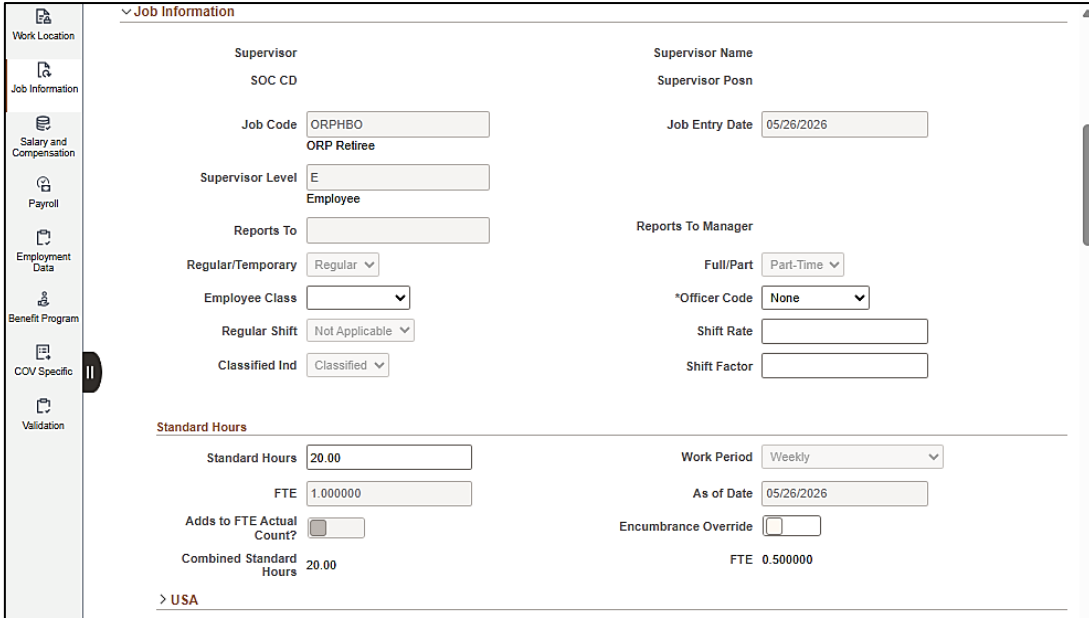
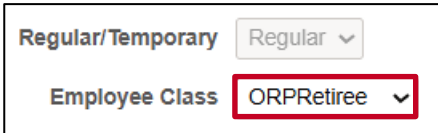
Assignments

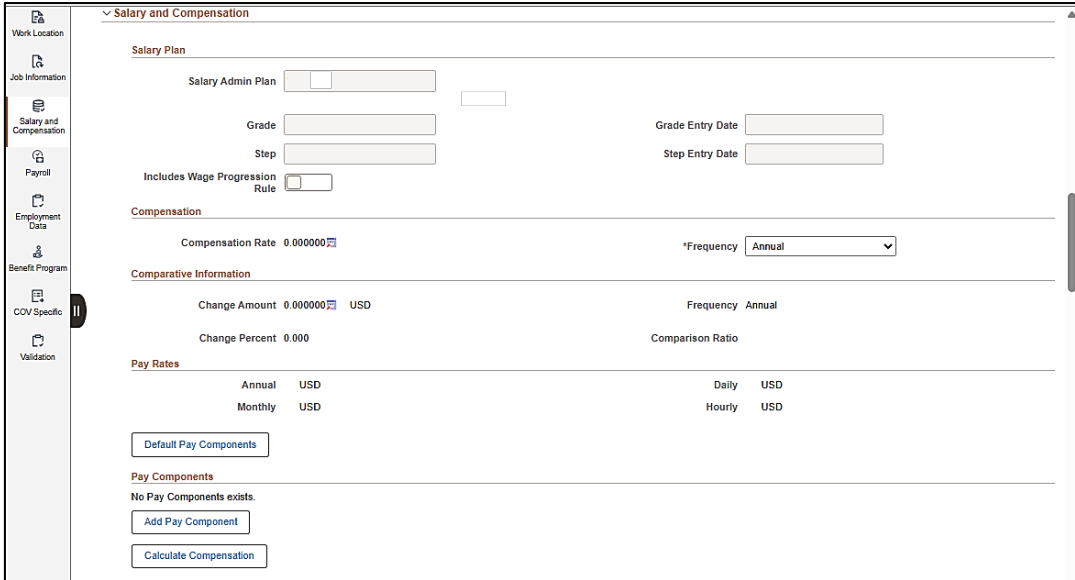
Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	
0			18100	18100	Inactive	04/01/1988	
Primary Job	Home	05/26/2026	Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Retired	05/25/2026	Manage Job

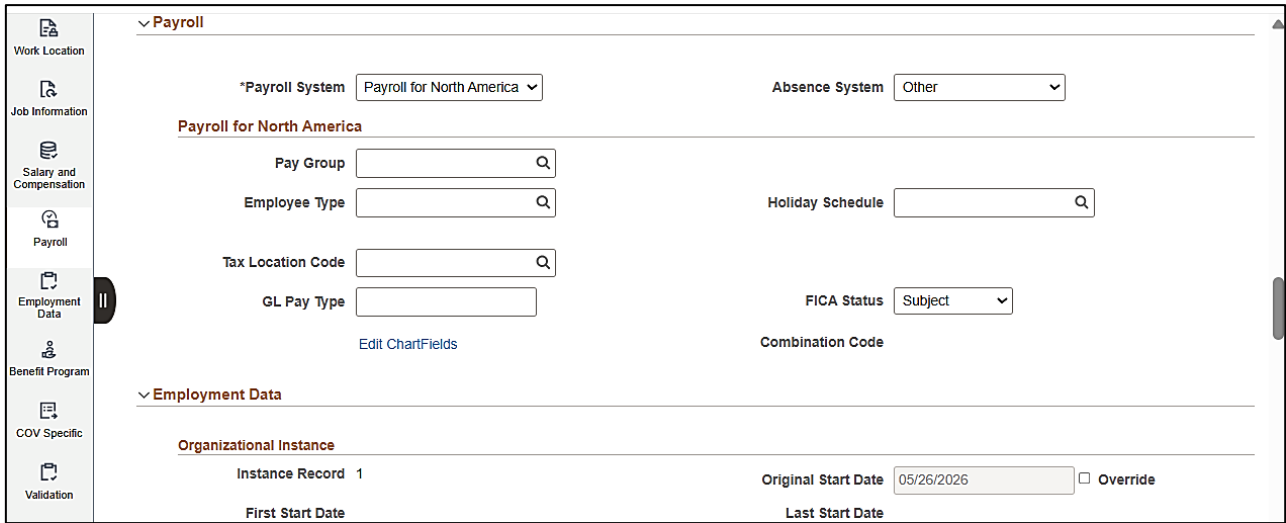
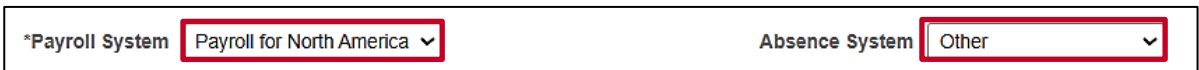
Step	Action
5.	Click the Add Organizational Relationship button. 
The Add Organizational Relationship page displays in a pop-up window. 	
6.	The Effective Date field defaults to the current system date. Click the Calendar icon to change the effective date to be the same date as the retirement action 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.

Step	Action
9.	Click the Continue button. 
The Add Employee Relationship page displays, Step 1 of 2: Job Data, with the Work Location section displayed by default. 	
10.	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". 

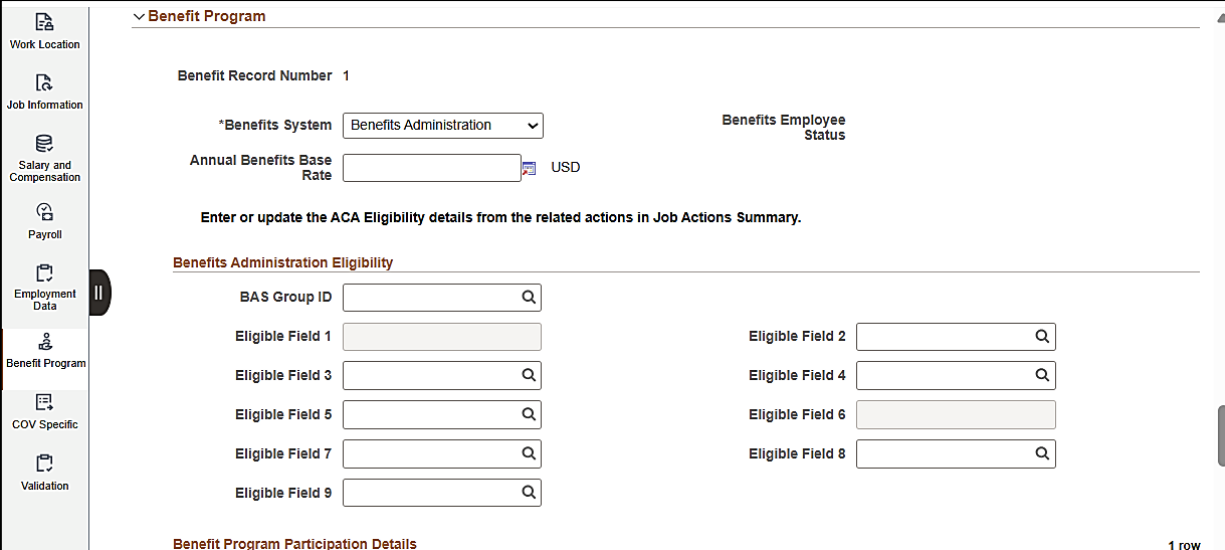
Step	Action
	The Work Location page refreshes and the position-related information auto-populates. 
11.	Click the Job Information tab. 

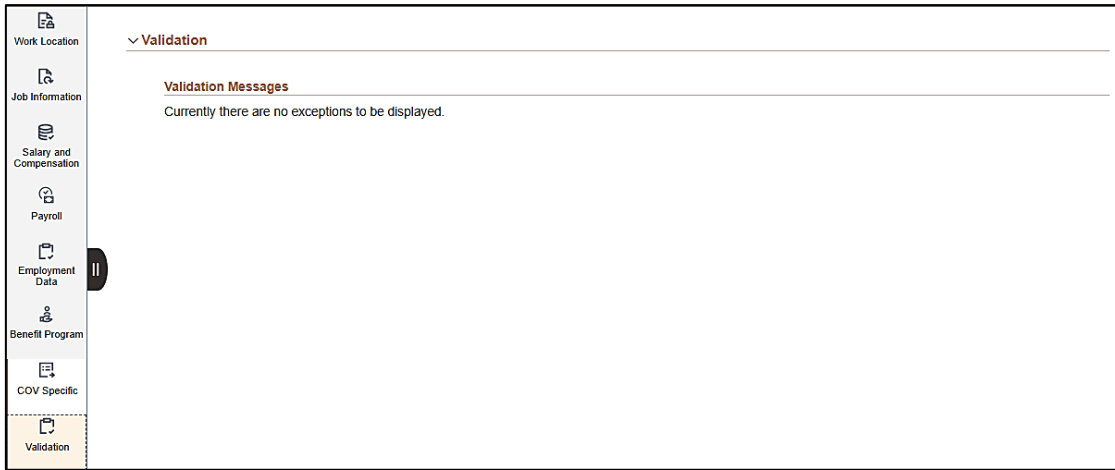
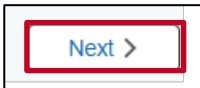
Step	Action
	The Job Information section displays. 
12.	Click the Employee Class dropdown button and select “ORPRetiree”. 
13.	Click the Salary and Compensation tab. 

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). Pay Group MNP Non-Payroll Employee Type S Salaried
19.	Enter the applicable Tax Location Code in the Tax Location Code field. Tax Location Code
20.	Click the Benefit Program tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

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 redisplay.

Validation

Validation Messages

☐ Proceed with warning

Validation Successful with warnings

2 rows

Message Severity ↑↓

Message Text ↑↓

1	Warning	Warning -- Compensation Frequency has been updated. (1010,264)
2	Warning	Warning -- Compensation Rate is zero. (1000,31)

24. Review the Validation messages and click the **Next** button.

Next >

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.

Validation

Validation Messages

Validation Successful with warnings

☒ Proceed with warning

The **Add Employee Relationship Step 2 of 2: Summary** page displays.

Add Employee Relationship

1

2

Job Data

Summary

< Previous

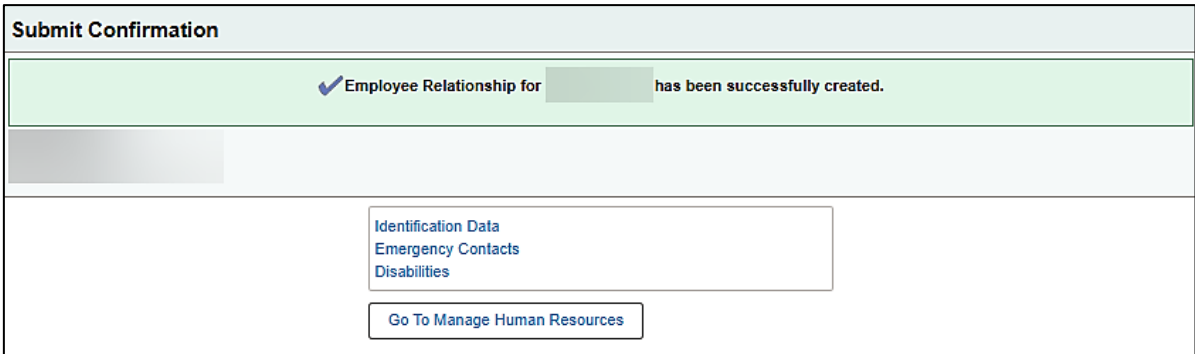
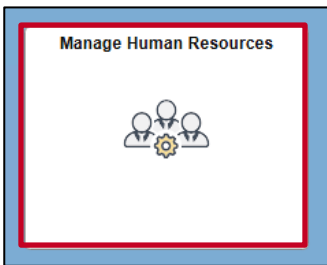
Submit

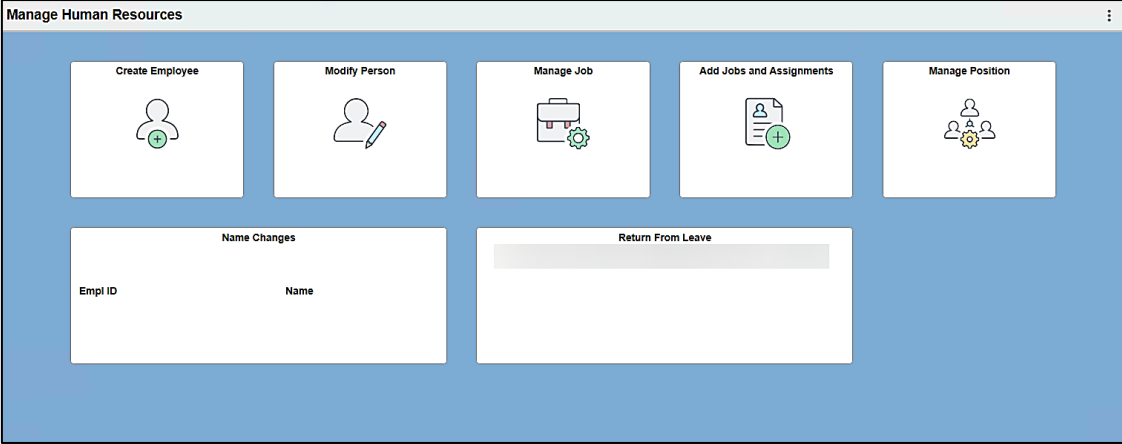
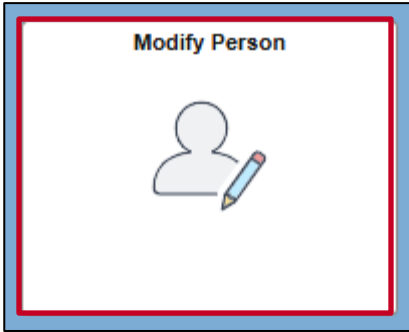
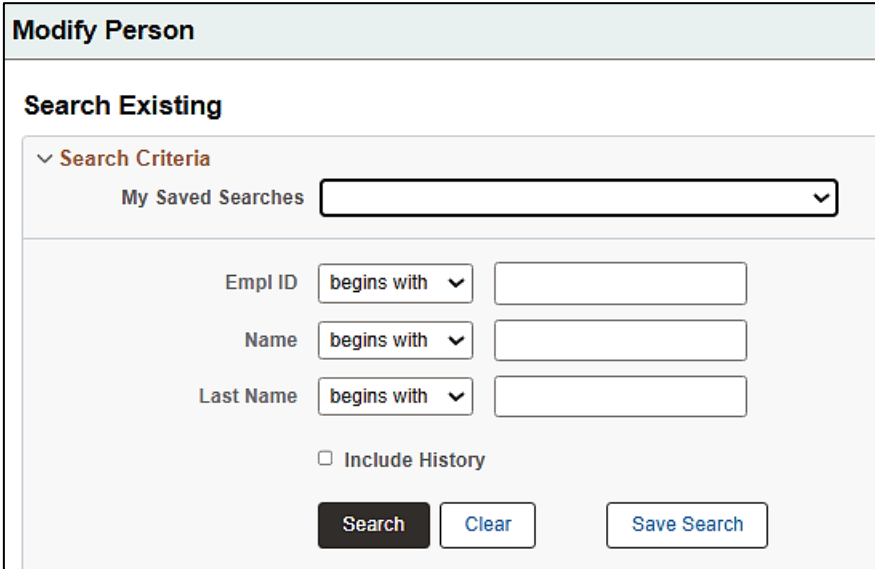
Step 2 of 2: Summary

Summary of Changes

Job Data

Field Label	Proposed Information
Position Number	DLIORP00-ORP Retiree Position
Regulatory Region	USA-United States
Company	DLI-Dept of Labor and Industry
Department	99999-Agency Wide
Location	RICH-Dept of Labor and Industry
Establishment ID	DOLI-Dept of Labor and Industry
Supervisor Level	E-Employee
Regular/Temporary	Regular
Full/Part	Part-Time
Employee Class	ORP Retiree
Officer Code	None
Standard Hours	20
ETC	0.000000

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. Empl ID begins with ▼
31.	Select the Include History checkbox option. ☒ Include History
32.	Click the Search button. Search Clear

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

Modify Person

1
Person Data

2
Summary

Next >

Person Details

Contact Information

Regional

VA Person Info

Validation

Step 1 of 2: Person Data
 ~ Person Details

Names

+

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

Personal Information

*Date of Birth

Birth Country

Birth Location

Date of Death

Birth State

Exclude Contact Information? ☐

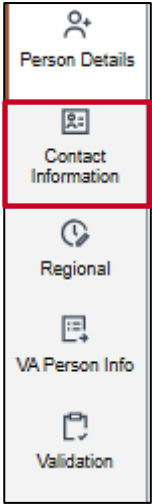
Biographical Details

Effective Date

Gender

Highest Education Level

Marital Status

Step	Action
33.	Click the Contact Information tab. 

The **Contact Information** section displays.

Modify Person

JOHN DOE

1

Person Data

2

Summary

Next >

Person Details

Contact Information

Regional

VA Person Info

Validation

Addresses

Display History

☒

Address Type	Effective Date	Address	
Home	09/23/2022		>
CURRENT			
Home	07/16/1994		>
HISTORY			

Phone

Type ↑↓	Number ↑↓	Extension ↑↓	Preferred ↑↓	
Business	555/555-5555		No	>
Mobile	555/555-5555		Yes	>
Home	555/555-5555		No	>

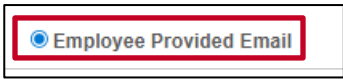
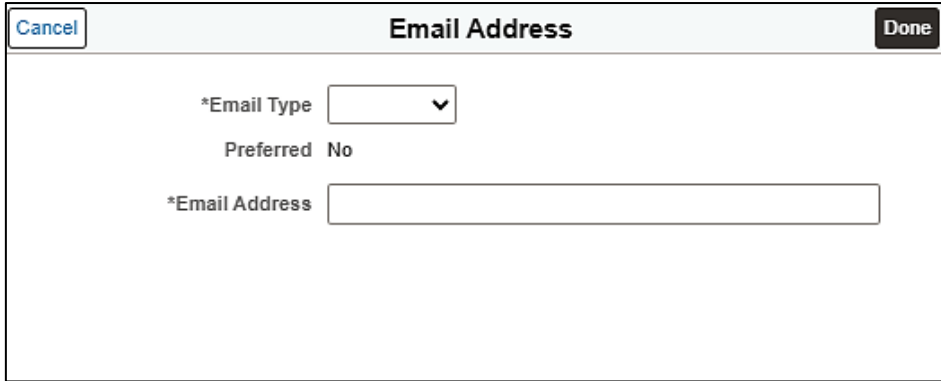
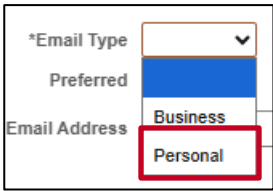
Email

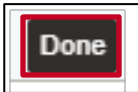
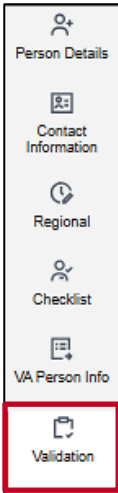
Email Option Selection

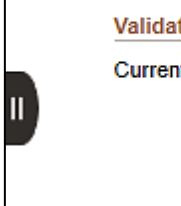
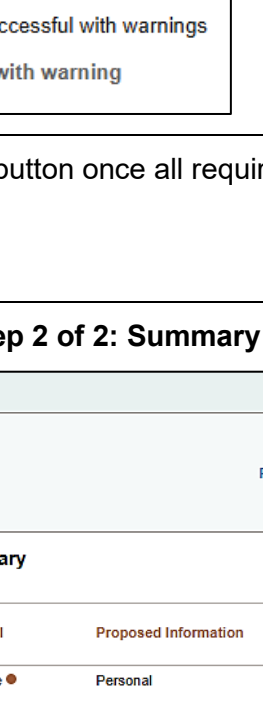
☒ Agency Provided Email
 ☐ Pending Agency Provided Email
 ☐ Employee Provided Email

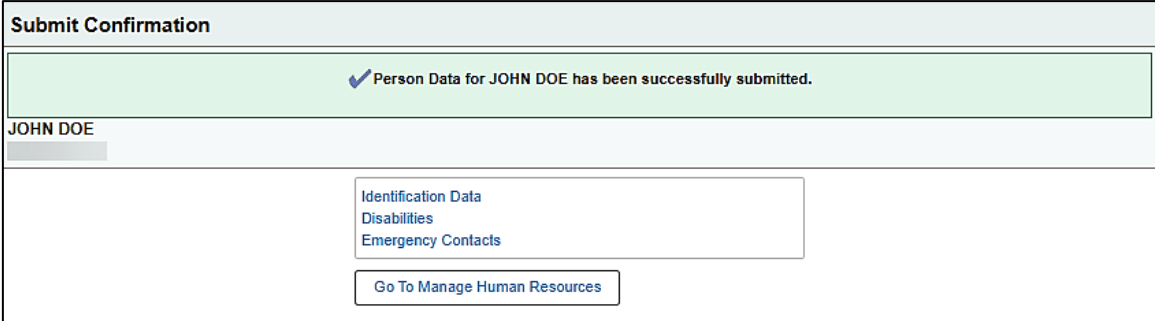
1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except:

2. VA Person Info email address is available, select available email address and ALWAYS use person@va.gov

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 redispays. 	
39.	Click the Validation tab. 

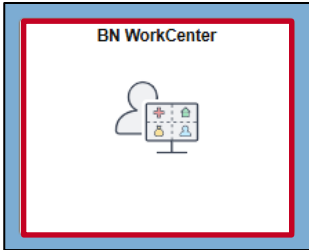
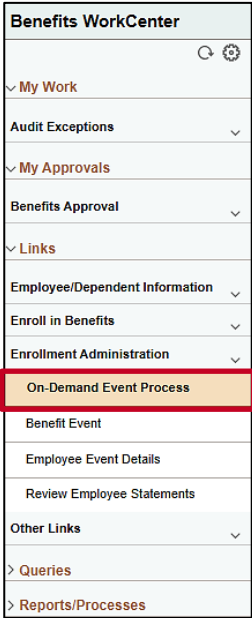
Step	Action
	The Validation section displays. 
	Validation messages may appear that include warnings and errors. If a Validation Warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving. 
40.	Click the Next button 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. On-Demand Event Maintenance Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Empl Record = Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive Search Clear

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

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

JOHN DOE

Person ID

Ben Record 1

Activity Date 05/26/2026

Source Job Data Change

Schedule/Prepare Activity

Pending Activities 1

Show Activities

Action HIR

Event ID 1

Event Date 05/26/2026

Status Prepared

Class HR2

Event Status Update

Prepare Options

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

Election Entry

Entered 0 of 0

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator N

Normal Processing

Save

Return to Search

Previous in List

Next in List

Notify

- Click the **Show Activities** button.

Show Activities

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

JOHN DOE

Person ID

Ben Record 1

BAS Activity

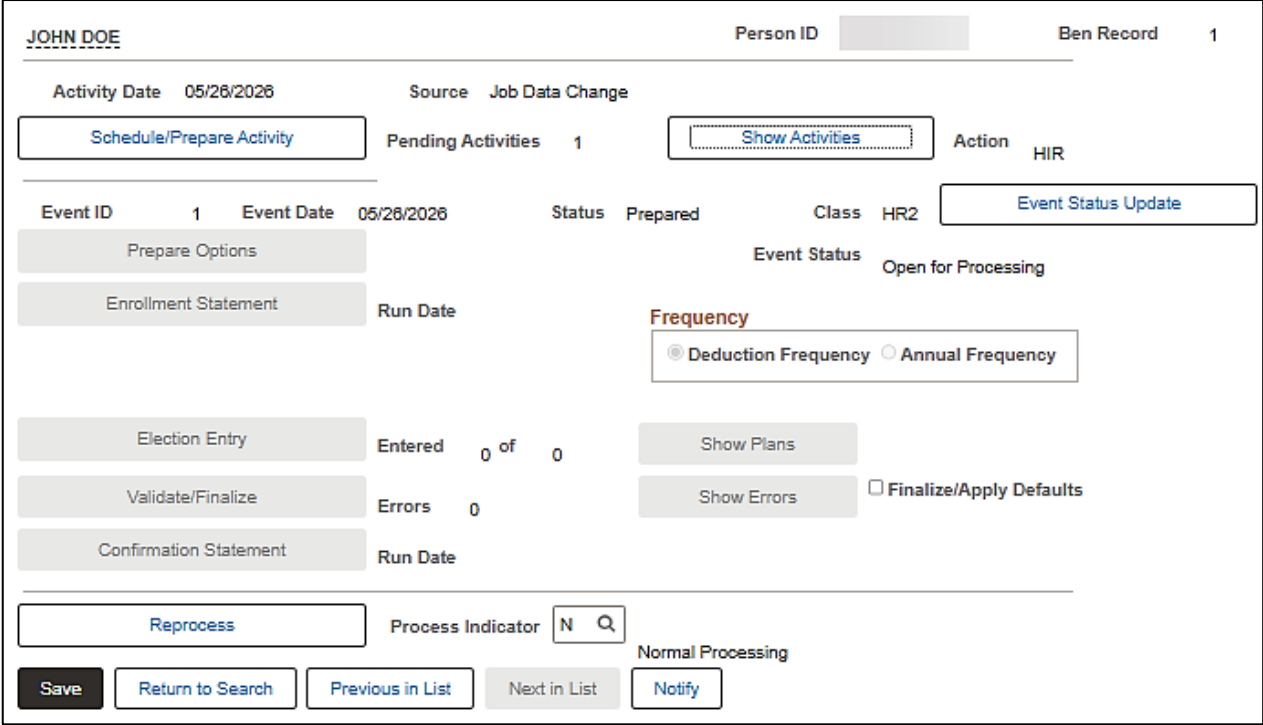
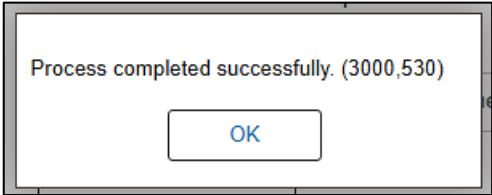
1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☒	1	Job Data Change	05/26/2026	0	HIR		+	-

OK

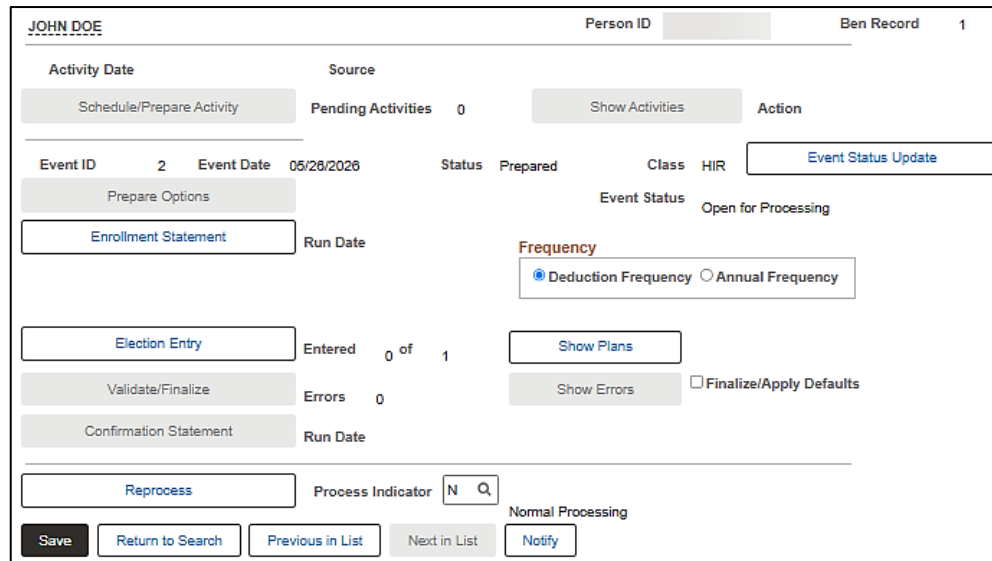
Cancel

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. BAS Activity < > 1-2 of 2 < > <table><tr><th>Select</th><th>Empl Record</th><th>Action Source</th><th>Event Date</th><th>Event Effseq</th><th>BAS Action</th><th>COBRA Action</th><th></th><th></th></tr><tr><td>☐</td><td>1</td><td>Manual Event</td><td>01/15/2026</td><td>0</td><td>HR2</td><td></td><td> + </td><td> - </td></tr><tr><td>☐</td><td>1</td><td>Job Data Change</td><td>01/15/2026</td><td>0</td><td>HIR</td><td></td><td> + </td><td> - </td></tr></table> Schedule/Prepare Activity 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. Show Plans Show Errors ☒ Finalize/Apply Defaults Election Entry Entered 0 of 0 Validate/Finalize Errors 0 Confirmation Statement Run Date <tr><td>6.</td><td> Click the OK button. OK Cancel </td></tr>	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		+	-	6.	Click the OK button. OK Cancel
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		+	-																						
6.	Click the OK button. OK Cancel																													

Step	Action
	The On-Demand Event Process page redisplay. 
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 redisplay.

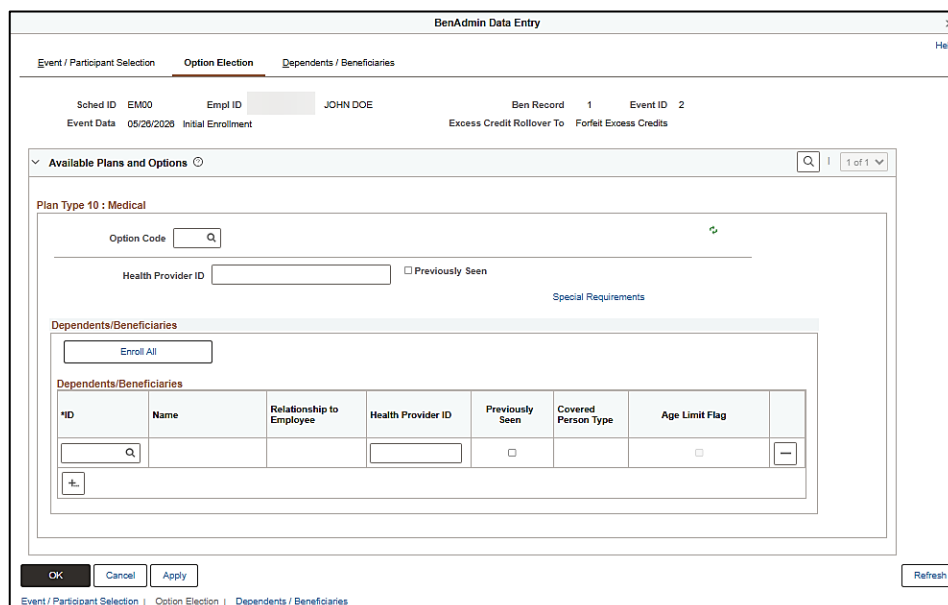


- Click the **Election Entry** button.



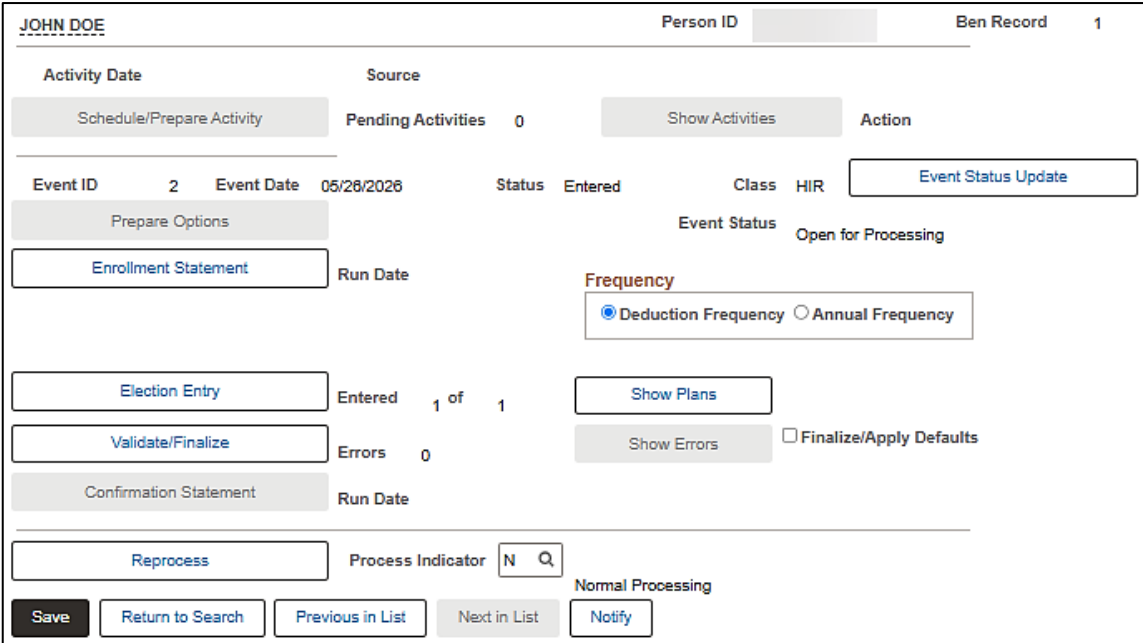
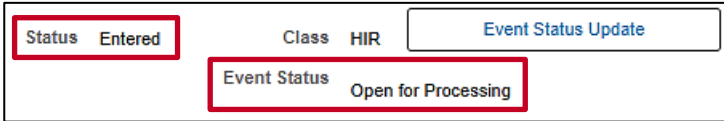
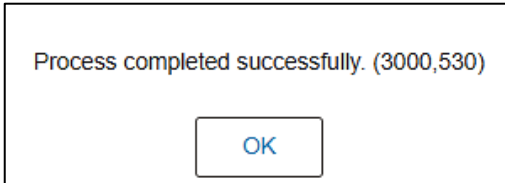

If the retiree is waiving coverage, there will be no Election Entry.

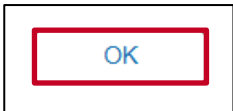
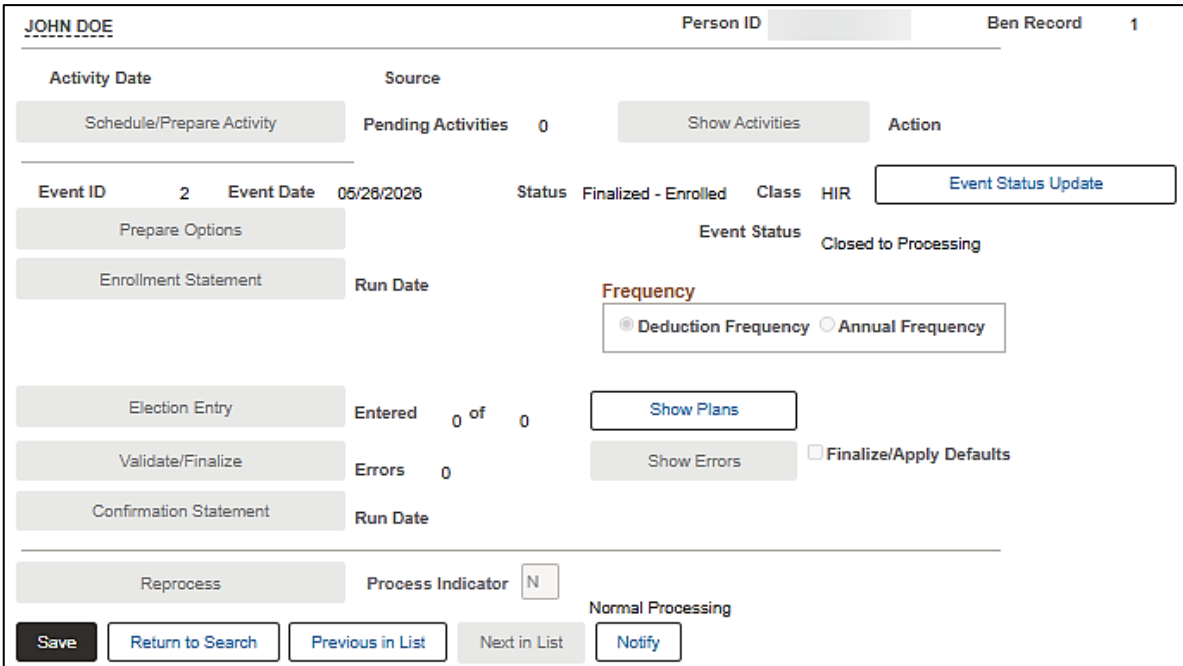
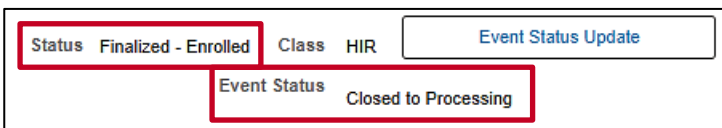
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.



Step	Action																																								
10.	Click the Option Code Look up icon in the Plan Type 10: Medical section. Plan Type 10 : Medical Option Code																																								
The Look Up Option Code page displays in a pop-up window. Look Up Option Code Cancel Search Results View 100 1-49 of 49 <table><thead><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr></thead><tbody><tr><td>1</td><td>Option</td><td>CHA</td><td>1</td></tr><tr><td>10</td><td>Option</td><td>CHA2</td><td>2</td></tr><tr><td>11</td><td>Option</td><td>CHA2</td><td>3</td></tr><tr><td>12</td><td>Option</td><td>CHA2</td><td>4</td></tr><tr><td>13</td><td>Option</td><td>CHD</td><td>1</td></tr><tr><td>14</td><td>Option</td><td>CHD</td><td>2</td></tr><tr><td>15</td><td>Option</td><td>CHD</td><td>3</td></tr><tr><td>16</td><td>Option</td><td>CHD</td><td>4</td></tr><tr><td>17</td><td>Option</td><td>CHD1</td><td>1</td></tr></tbody></table>		Option Code	Option Type	Benefit Plan	Coverage Code	1	Option	CHA	1	10	Option	CHA2	2	11	Option	CHA2	3	12	Option	CHA2	4	13	Option	CHD	1	14	Option	CHD	2	15	Option	CHD	3	16	Option	CHD	4	17	Option	CHD1	1
Option Code	Option Type	Benefit Plan	Coverage Code																																						
1	Option	CHA	1																																						
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12	Option	CHA2	4																																						
13	Option	CHD	1																																						
14	Option	CHD	2																																						
15	Option	CHD	3																																						
16	Option	CHD	4																																						
17	Option	CHD1	1																																						
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) <table><thead><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr></thead><tbody><tr><td>1</td><td>Option</td><td>CHA</td><td>1</td></tr><tr><td>10</td><td>Option</td><td>CHA2</td><td>2</td></tr><tr><td>11</td><td>Option</td><td>CHA2</td><td>3</td></tr><tr><td>12</td><td>Option</td><td>CHA2</td><td>4</td></tr></tbody></table>	Option Code	Option Type	Benefit Plan	Coverage Code	1	Option	CHA	1	10	Option	CHA2	2	11	Option	CHA2	3	12	Option	CHA2	4																				
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1	Option	CHA	1																																						
10	Option	CHA2	2																																						
11	Option	CHA2	3																																						
12	Option	CHA2	4																																						

Step	Action																
	The Plan Type 10: Medical section redisplay with the selected Option Code displayed. Plan Type 10 : Medical Option Code 10 Q COVA HlthAwrr + Exp Den (CHA2) (Self + Spouse) Health Provider ID ☐ Previously Seen																
12.	Click the Enroll All button. Dependents/Beneficiaries Enroll All																
	The retiree's spouse displays in the Dependents/Beneficiaries section. Dependents/Beneficiaries Enroll All Dependents/Beneficiaries <table><tr><th>*ID</th><th>Name</th><th>Relationship to Employee</th><th>Health Provider ID</th><th>Previously Seen</th><th>Covered Person Type</th><th>Age Limit Flag</th><th></th></tr><tr><td>01</td><td>JO DOE</td><td>Spouse</td><td></td><td>☐</td><td>Spouse</td><td>☐</td><td>—</td></tr></table> +	*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		01	JO DOE	Spouse		☐	Spouse	☐	—
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag											
01	JO DOE	Spouse		☐	Spouse	☐	—										
13.	Click the OK button. OK Cancel Apply																

Step	Action
	The On-Demand Event Process page redisplay. 
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 redisplay. 	
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:

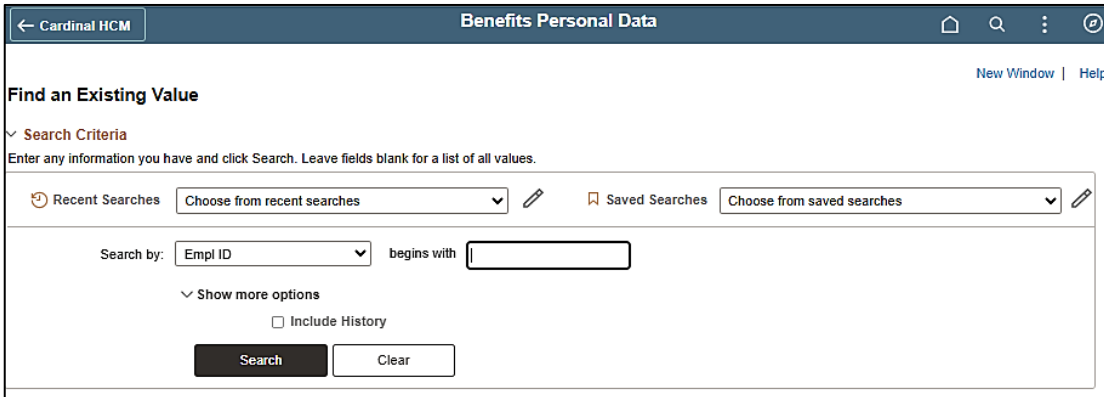
- [Set Up Medicare for the ORP Retiree](#)
- [Enrolling the ORP Retiree into a Medicare Medical Plan](#)
- [Hire the Youngest Dependent as an Employee](#)
- [Enrolling the Dependent\(s\) in Benefits](#)

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. 

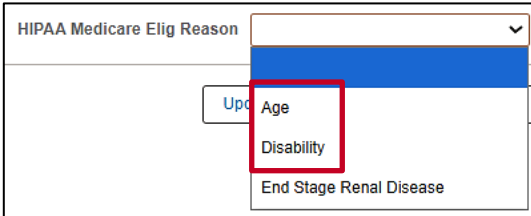


The Search Results display.

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

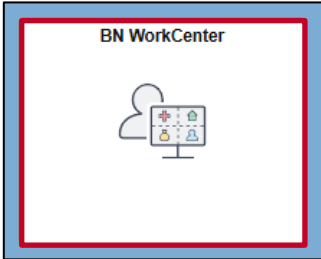
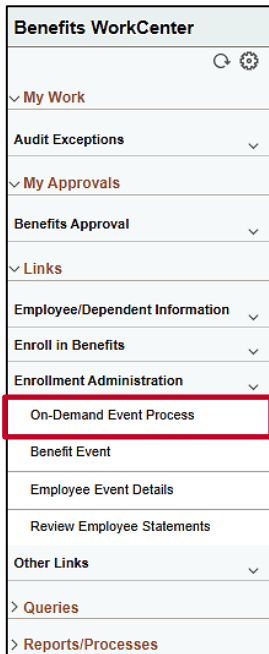
The **Benefits Personal Data** page displays.

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

JOHN DOE
Person ID
Ben Record 1

Activity Date 06/01/2026
Source Job Data Change

Schedule/Prepare Activity
Pending Activities 1
Show Activities
Action HIR

Event ID 0
Event Date
Status
Class
Event Status Update

Prepare Options
Enrollment Statement
Run Date
Frequency
Deduction Frequency
Annual Frequency

Election Entry
Entered 0 of 0
Show Plans

Validate/Finalize
Errors 0
Show Errors
Finalize/Apply Defaults

Confirmation Statement
Run Date

Reprocess
Process Indicator N
Normal Processing

Save
Return to Search
Previous in List
Next in List
Notify

- Click the **Show Activities** button.

Show Activities

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

JOHN DOE
Person ID
Ben Record 1

BAS Activity

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☒	1	Job Data Change	06/01/2026	0	HIR		+	-

OK
Cancel

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. BAS Activity <table border="1"> <thead> <tr> <th>Select</th> <th>Empl Record</th> <th>Action Source</th> <th>Event Date</th> <th>Event Effseq</th> <th>BAS Action</th> <th>COBRA Action</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>☐</td> <td>1</td> <td>Manual Event</td> <td>01/15/2026</td> <td>0</td> <td>HR2</td> <td></td> <td>+</td> <td>-</td> </tr> <tr> <td>☐</td> <td>1</td> <td>Job Data Change</td> <td>01/15/2026</td> <td>0</td> <td>HIR</td> <td></td> <td>+</td> <td>-</td> </tr> </tbody> </table> Schedule/Prepare 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		+	-
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		+	-																				
6.	Click the OK button. OK Cancel																											

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

JOHN DOE Person ID Ben Record 1

Activity Date 06/01/2026 Source Job Data Change

[Schedule/Prepare Activity](#) Pending Activities 1 [Show Activities](#) Action HIR

Event ID 0 Event Date Status Class [Event Status Update](#)

[Prepare Options](#)

[Enrollment Statement](#) Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

[Election Entry](#) Entered 0 of 0 [Show Plans](#)

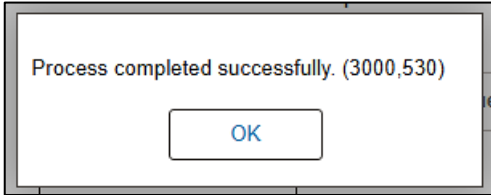
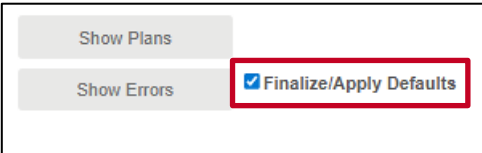
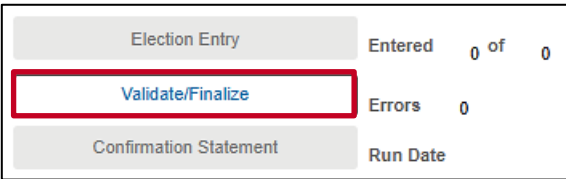
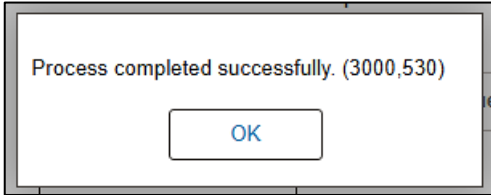
[Validate/Finalize](#) Errors 0 [Show Errors](#) ☐ Finalize/Apply Defaults

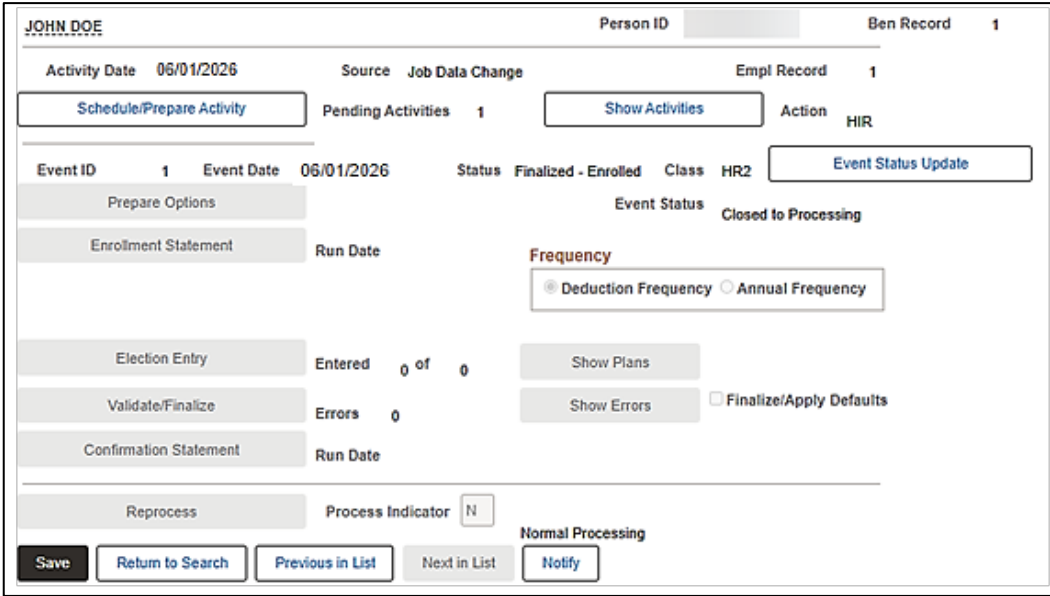
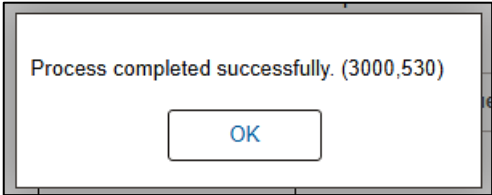
[Confirmation Statement](#) Run Date

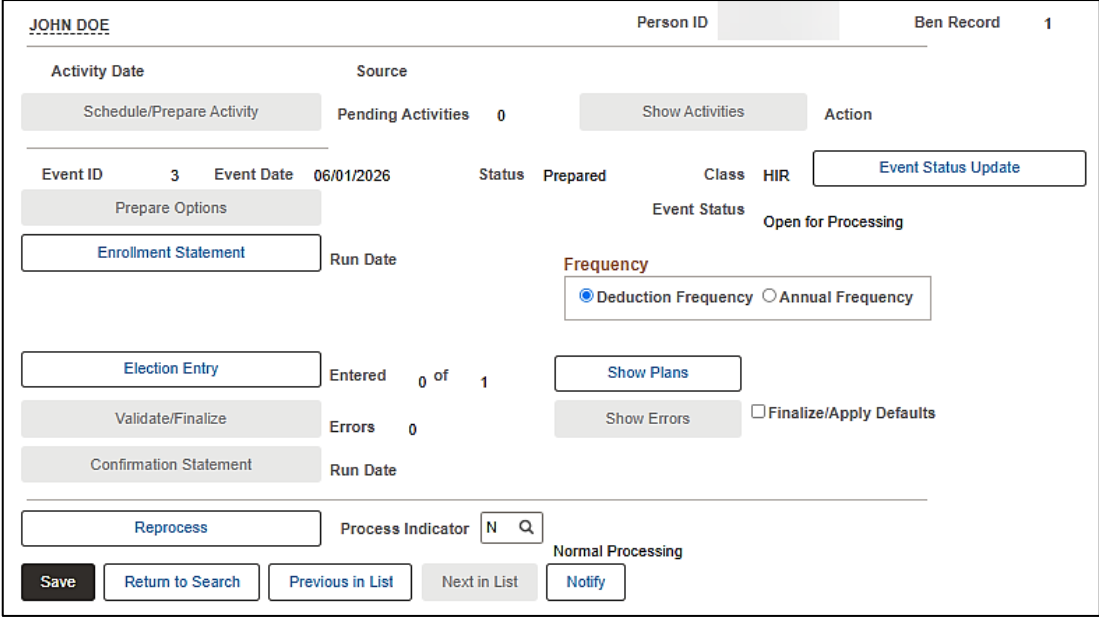
[Reprocess](#) Process Indicator N

Normal Processing

Save [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

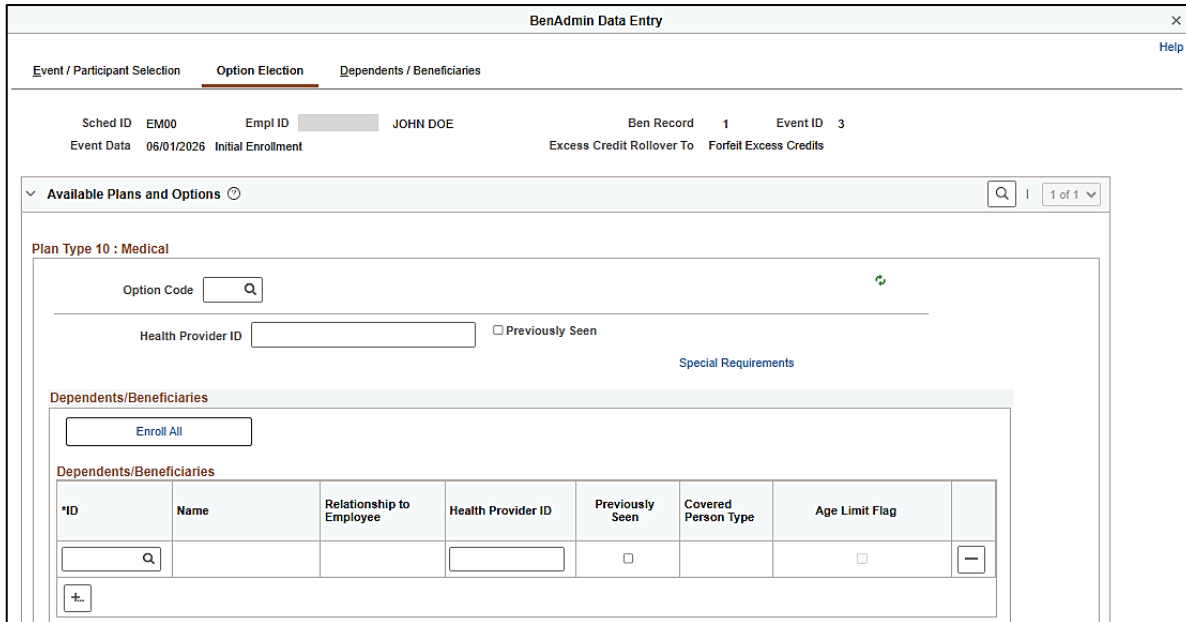
Step	Action
7.	Click the Schedule/Prepare Activity button to manually run the Benefits Administration process for this Benefit Event. 
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 
8.	Click the OK button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

Step	Action
11.	Click the OK button to close the message. 
The On-Demand Event Process page redisplay. 	
12.	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. 	
13.	Click the OK button to close the message. 

Step	Action
	The On-Demand Event Process page redisplay. 
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.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID JOHN DOE Ben Record 1 Event ID 3

Event Data 06/01/2026 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code

Health Provider ID ☐ Previously Seen

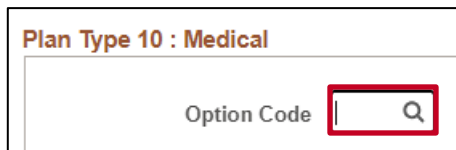
Special Requirements

Dependents/Beneficiaries

Enroll All

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
				☐		☐

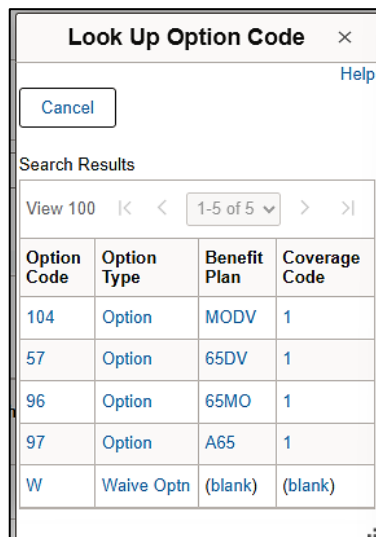
- Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section.



Plan Type 10 : Medical

Option Code

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



Look Up Option Code

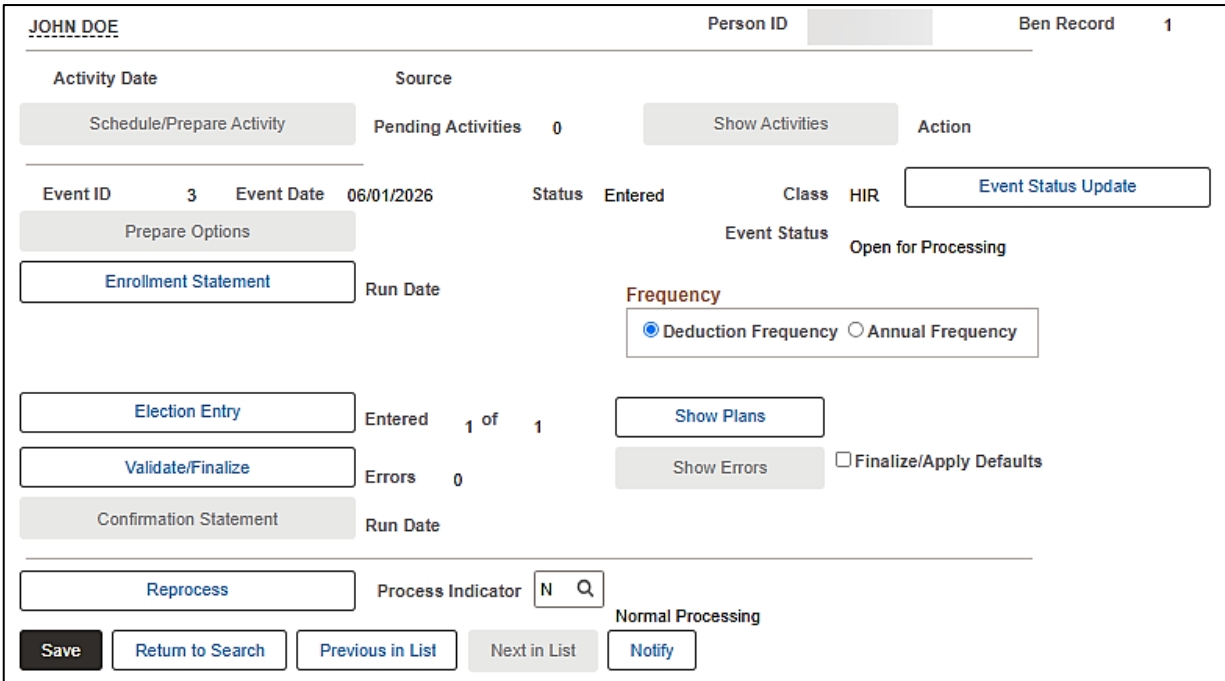
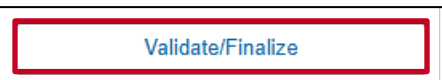
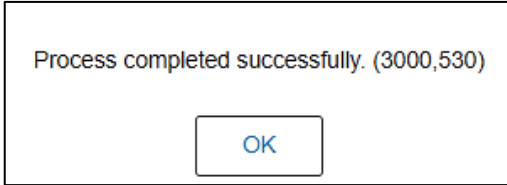
Cancel

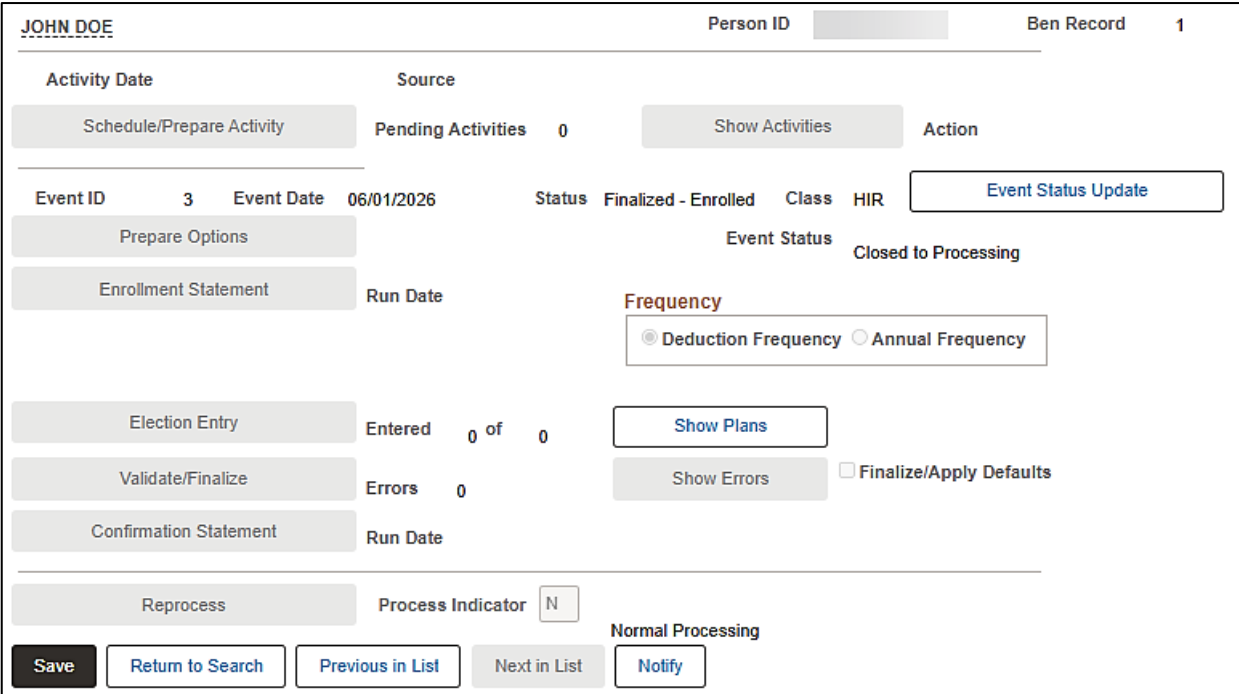
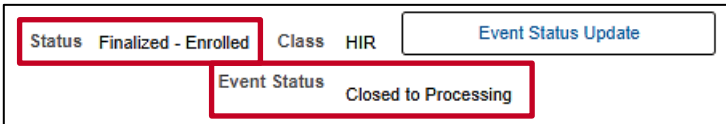
Search Results

View 100 1-5 of 5

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)

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. <table><thead><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr></thead><tbody><tr><td>104</td><td>Option</td><td>MODV</td><td>1</td></tr><tr><td>57</td><td>Option</td><td>65DV</td><td>1</td></tr><tr><td>96</td><td>Option</td><td>65MO</td><td>1</td></tr><tr><td>97</td><td>Option</td><td>A65</td><td>1</td></tr><tr><td>W</td><td>Waive Optn</td><td>(blank)</td><td>(blank)</td></tr></tbody></table>	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)
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 redispays with the selected Option Code displayed. Plan Type 10 : Medical Option Code 57  Advan65 + RX + Den&Vision (65DV) (Single) Health Provider ID ☐ Previously Seen																									
17.	Click the OK button. OK Cancel Apply																								

Step	Action
	The On-Demand Event Process page redisplay. 
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. 

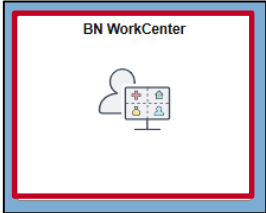
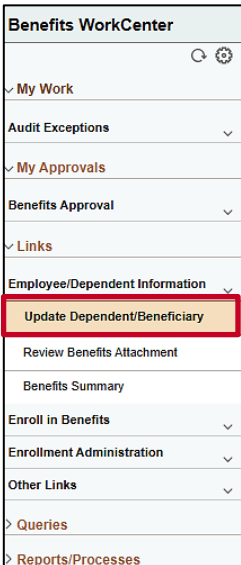
Step	Action
	The On-Demand Event Process page redisplay. 
20.	Confirm that the Status field is “Finalized – Enrolled” and the Event Status field is “Closed to Processing”. 
	The process is now complete for the ORP Retiree.

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. Update Dependent/Beneficiary Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches ▼ Saved Searches Choose from saved searches ▼ Empl ID begins with ▼ Name begins with ▼ Last Name begins with ▼ Second Last Name begins with ▼ Alternate Character Name begins with ▼ Middle Name begins with ▼ ^ Show fewer options ☐ Case Sensitive ☐ Include History ☐ Correct History Search Clear	
	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. Empl ID begins with ▼
4.	Click the Search button. Search Clear

Page 59 of 100



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. < 1 of 3 > > View All

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

NameAddressPersonal Profile

JOHN DOEPerson ID

Personal Profile2 of 2View All

Dependent/Beneficiary ID 02JENNY DOE

*Date of Birth01/18/2010Birth LocationBirth CountryBirth StateDate of DeathMedicare Entitled Date

Riders/Orders existRiders/Orders

Dependent Proof

☒ Qualified Dependent

Personal History1 of 1View All

*Effective Date06/01/2024

*Relationship to EmployeeChild

*Dependent Beneficiary TypeApproved Dependent

*GenderFemale

*Marital StatusSingle

☐ Student☐ Disabled☐ Smoker

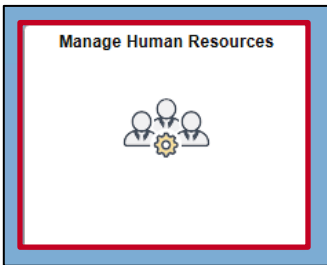
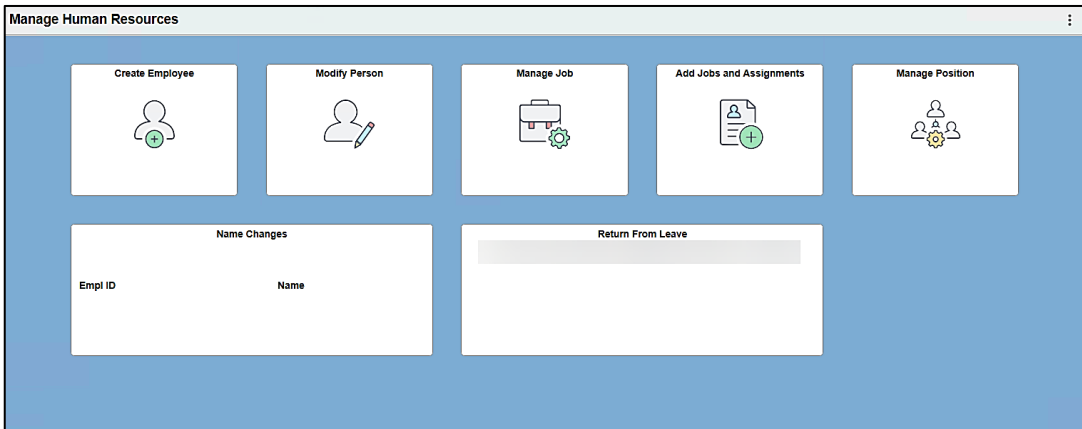
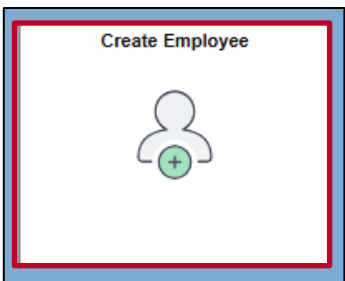
As ofAs ofAs ofAs of

Occupation

USA

National ID

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 Address Personal Profile JOHN DOE Person ID - Name of the youngest dependent Personal Profile Dependent/Beneficiary ID 02 JENNY DOE - Date of Birth of youngest dependent Dependent/Beneficiary ID 02 JENNY DOE *Date of Birth 01/18/2010 - Social Security Number (SSN) from National ID field of the youngest dependent National ID 1-1 of 1 <table border="1"> <thead> <tr> <th>*Country</th><th>*National ID Type</th><th>Description</th><th>National ID</th><th>Primary ID</th></tr> </thead> <tbody> <tr> <td>USA</td><td>PR</td><td>Social Security Number</td><td></td><td>☒</td></tr> </tbody> </table>	*Country	*National ID Type	Description	National ID	Primary ID	USA	PR	Social Security Number		☒
*Country	*National ID Type	Description	National ID	Primary ID							
USA	PR	Social Security Number		☒							
	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. Name Address Personal Profile										
The Address page for the youngest dependent displays. Name Address Personal Profile Dependent/Beneficiaries JOHN DOE Person ID Dependent/Beneficiary ID 02 Name JENNY DOE Address History *Effective Date 08/01/2024 Same Address as Employee Address Type Home Employee's Current Address Country USA United States Address 100 MAIN ST RICHMOND, VA 99999											

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. 	
12.	Click the Create Employee tile. 

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

The **Create Employee** page displays.



Create Employee

Personal Details

*National ID Date of Birth

First Name Middle Name

Last Name

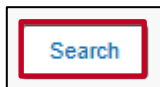
[Search](#)

- Enter the dependent's Social Security number in the **National ID** field.



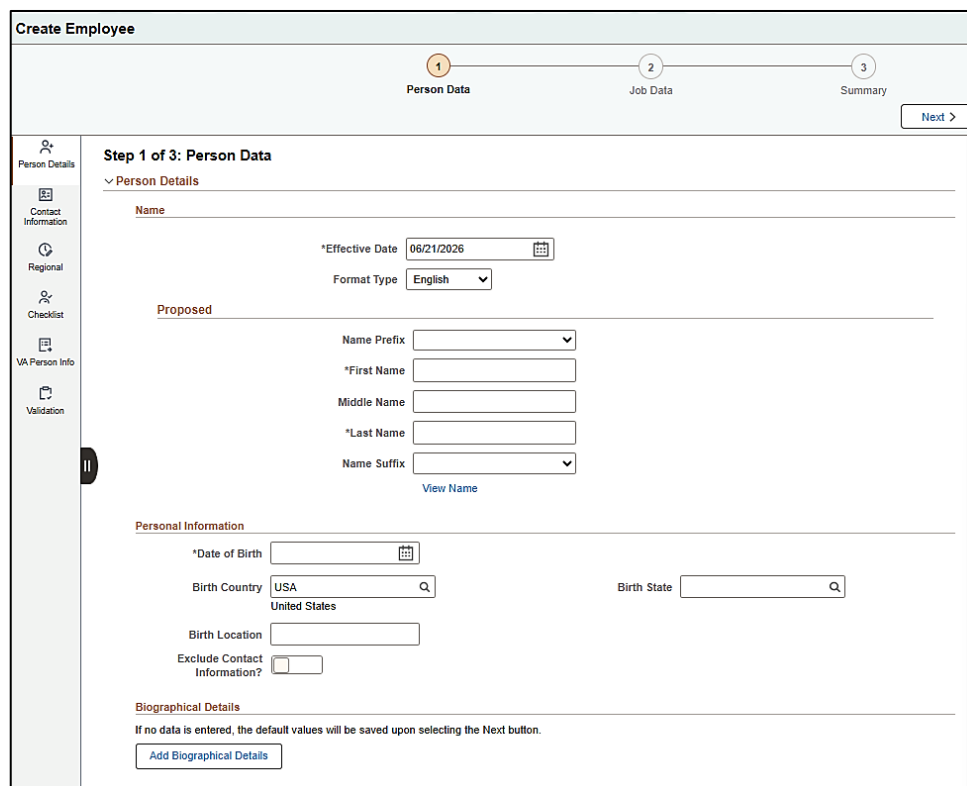
*National ID

- Click the **Search** button.



[Search](#)

The **Create Employee** page displays with the **Person Details** tab (**Step 1 of 3: Person Data**) displayed by default.



Create Employee

1 Person Data 2 Job Data 3 Summary [Next >](#)

Step 1 of 3: Person Data

Person Details

Name

*Effective Date 06/21/2026

Format Type English

Proposed

Name Prefix

*First Name

Middle Name

*Last Name

Name Suffix

[View Name](#)

Personal Information

*Date of Birth

Birth Country USA

United States

Birth Location

Exclude Contact Information? ☐

Biographical Details

If no data is entered, the default values will be saved upon selecting the Next button.

[Add Biographical Details](#)

Person Details

Contact Information

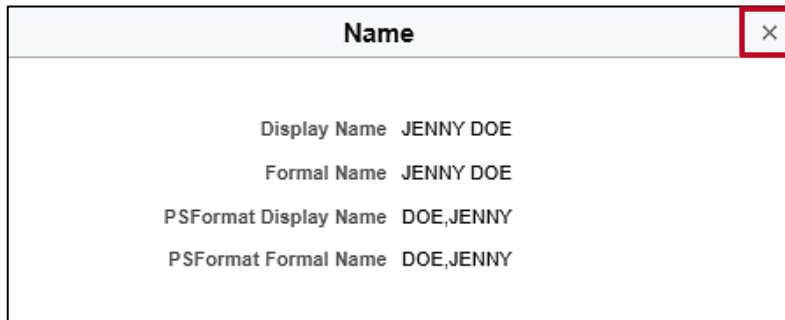
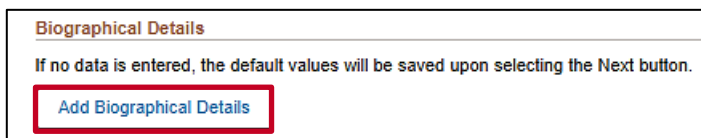
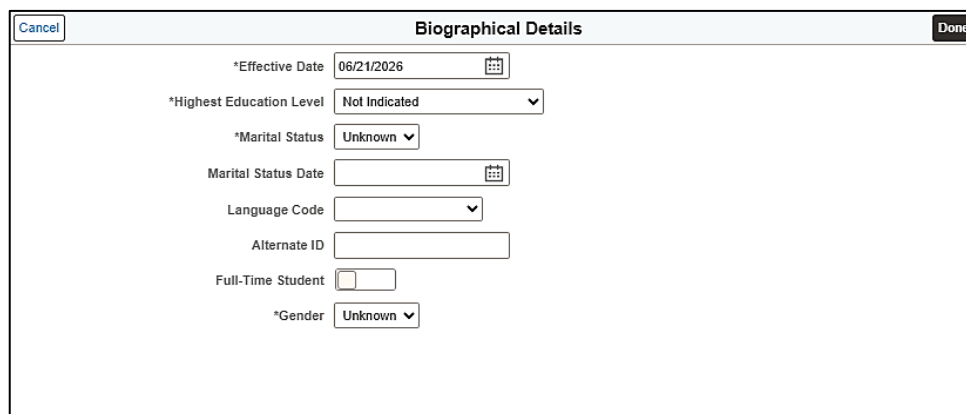
Regional

Checklist

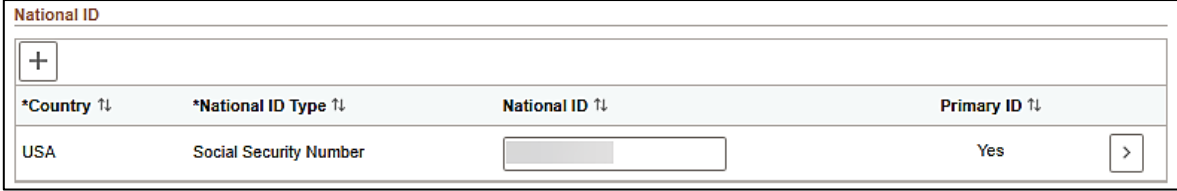
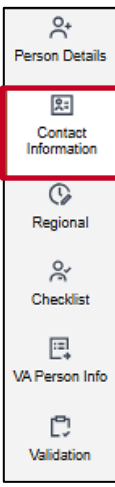
VA Person Info

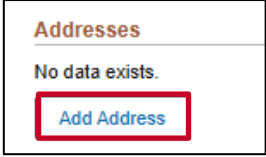
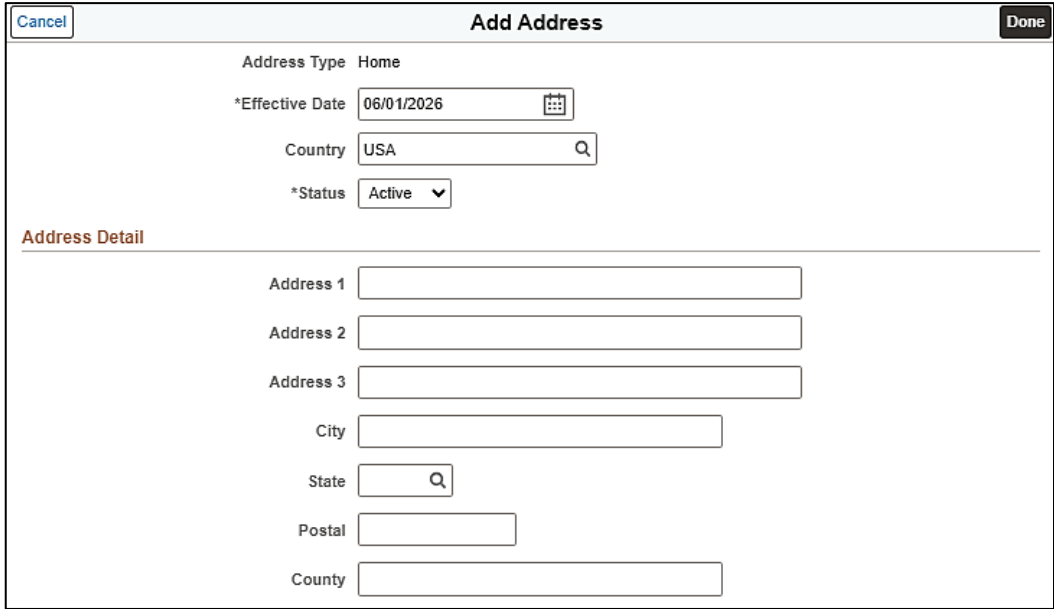
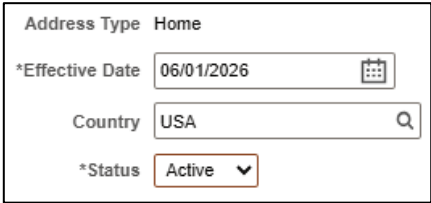
Validation

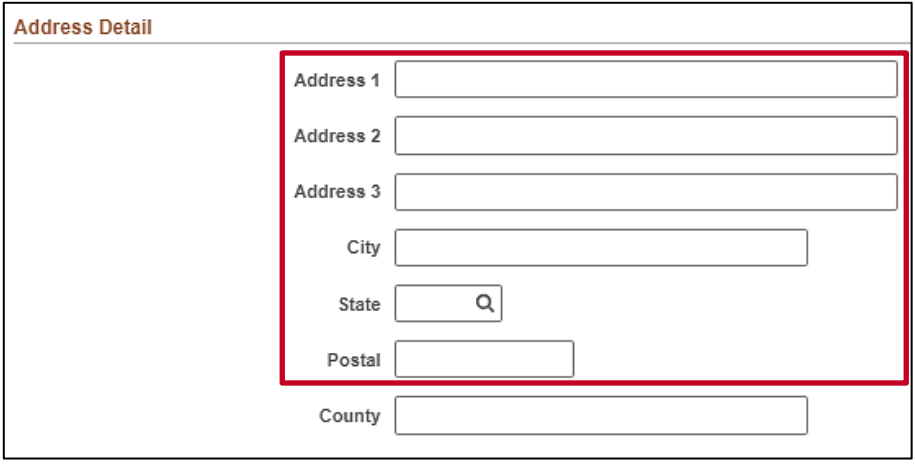
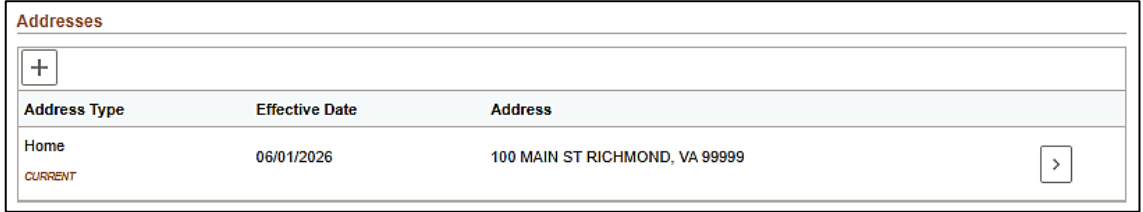
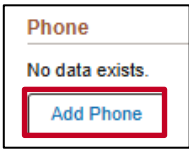
Step	Action
15.	The Effective Date field defaults to the system date. Update to the hire date, which should match the retirement date of the retiree ("06/01/2026" in this example). Note: The Effective Date cannot be greater than today's date when adding or modifying a person in Cardinal. For further 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. *Effective Date 06/01/2026 
16.	Optionally, click the Name Prefix dropdown button and select the applicable prefix. Name Prefix ▼
17.	Enter the employee's first name in the First Name field (required). *First Name
18.	Optionally, enter the employee's middle name or middle initial in the Middle Name field. Middle Name
	Do not add a period behind the middle initial.
19.	Enter the employee's last name in the Last Name field (required). *Last Name
	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. Name Suffix ▼ View Name
21.	Optionally, click the View Name link to view the how the name will be displayed. Name Suffix ▼ View Name

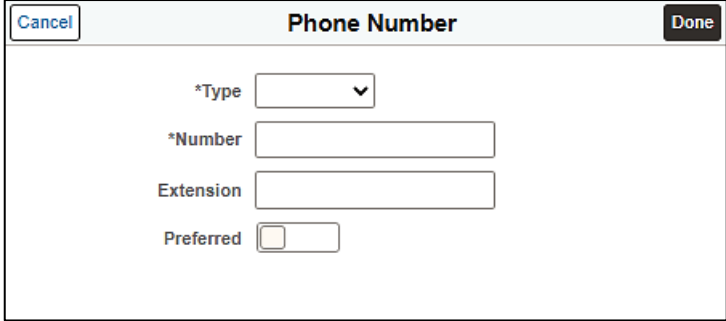
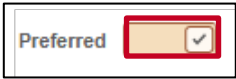
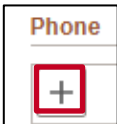
Step	Action
	The Name page displays in a pop-up window. Note: After reviewing, users can click the “X” button to close the pop-up window and adjust the name fields if needed. 
22.	Scroll down to the Personal Information section and click the Date of Birth Calendar icon to select the employee’s date of birth (required). Note: The Birth Country field defaults to “USA”. This can be updated but is not required as this data is not reported. 
23.	Click the Add Biographical Details button. 
	The Biographical Details page displays in a pop-up window. 

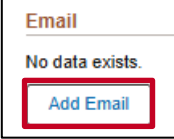
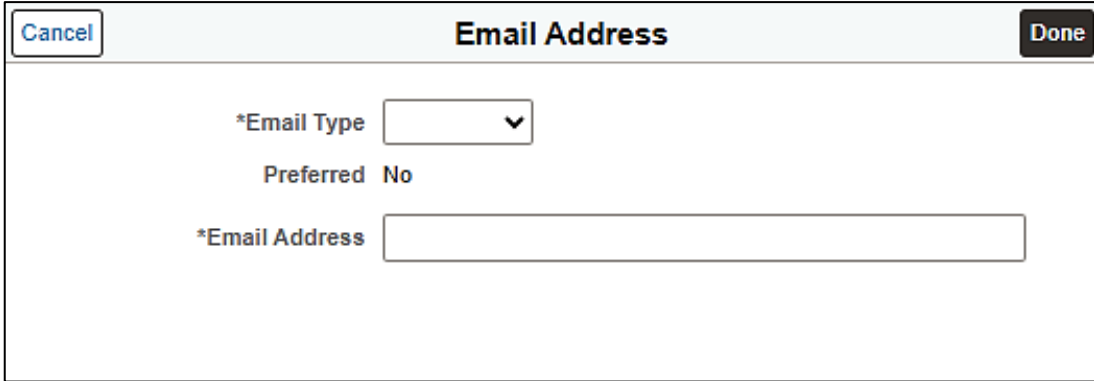
Step	Action
24.	Review the Effective Date field to ensure it matches the Effective Date in the Name section ("06/01/2026" in this example). If not, update to match. *Effective Date 06/01/2026
25.	Click the Marital Status dropdown button and select the dependent's legal marital status. *Marital Status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

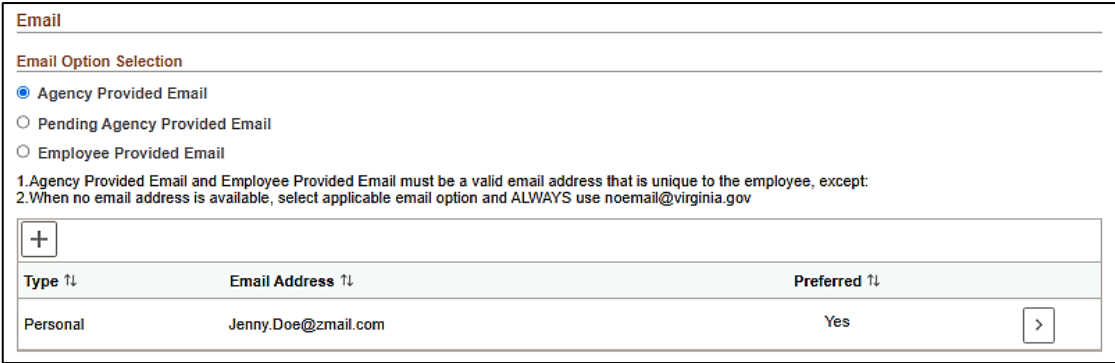
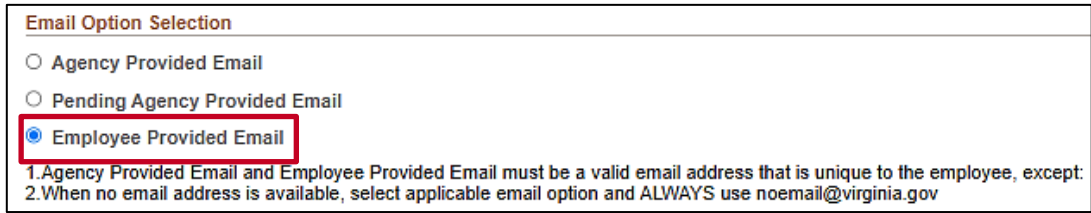
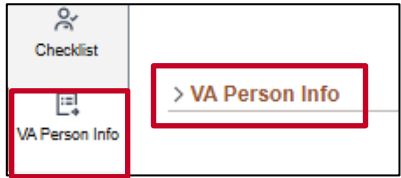
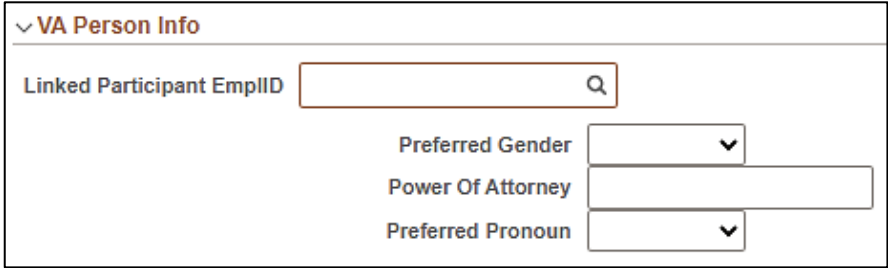
Step	Action
	The National ID section auto-populates. 
28.	Click the Contact Information tab or use the scroll bar to scroll to the Contact Information section. 
	The Contact Information section displays. 

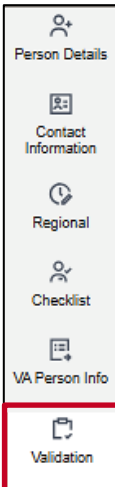
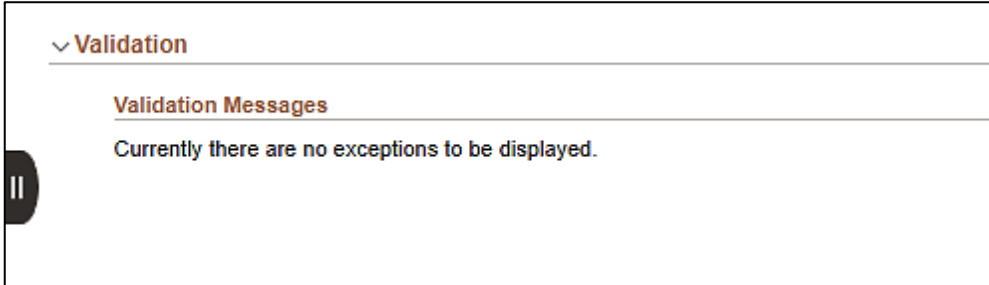
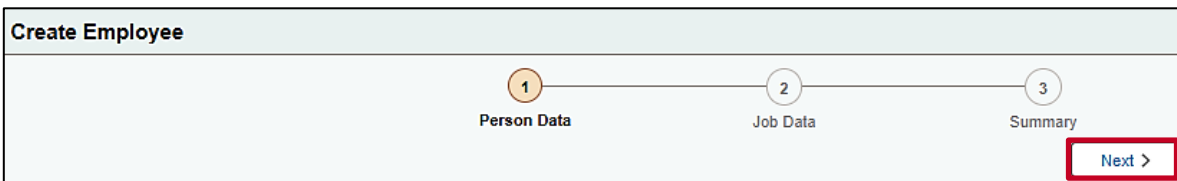
Step	Action
29.	Click the Add Address button in the Addresses section. 
The Add Address page displays in a pop-up window. 	
	The top section of the Add Address page auto-populates. Do not change. 
	An Address Type of “Home” is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information.

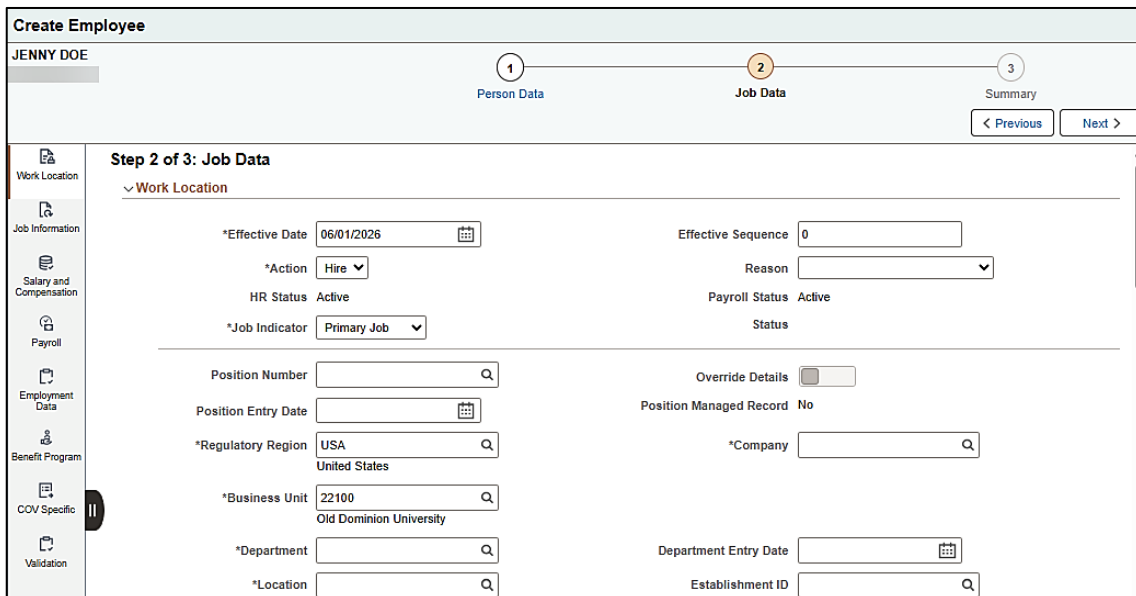
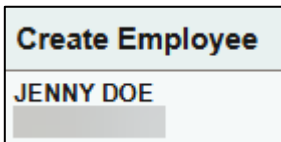
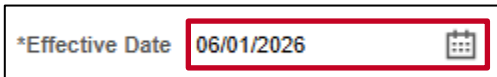
Step	Action
30.	Enter the employee's address information using the applicable fields in the Address Detail section. 
	The Address 1, City, State, and Postal are required fields. The employee's personal data cannot be saved if any of these fields are blank.
31.	Click the Done button once the applicable Address Detail information has been entered. 
The Addresses section redisplay. 	
32.	Click the Add Phone button in the Phone section. 

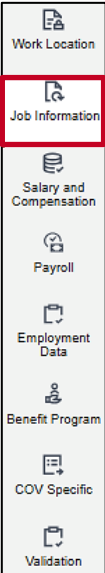
Step	Action
	The Phone Number page displays in a pop-up window. 
33.	Click the Type dropdown button and select the type of phone number being entered. 
34.	Enter the applicable telephone number in the Telephone field. 
	It is not necessary to enter dashes. When tabbing out of the field, the applicable phone number format will auto-populate.
35.	Select the Preferred field toggle to identify the dependent's preferred phone number. 
36.	Click the Done button once the Phone Number information has been entered. 
	Additional phone numbers can be added for the employee as needed by clicking the Add button (+) and then repeating Steps 32 - 36. 

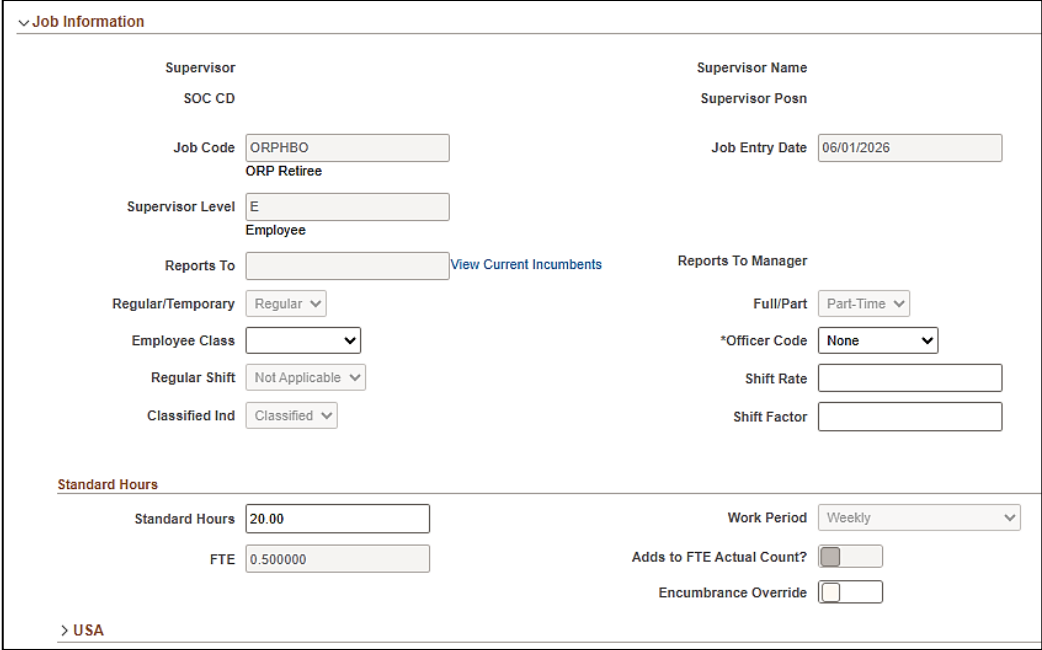
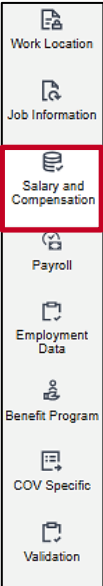
Step	Action
37.	Click the Add Email button in the Email section. 
The Email Address page displays in a pop-up window. 	
38.	Click the Email Type dropdown button and select "Personal". 
39.	Enter the dependent's email address in the Email Address field. 
40.	Click the Done button. 

Step	Action
	The Email section redisplay and the Preferred field defaults to “Yes”. 
41.	Select the Employee Provided Email radio button option in the Email Option Selection section. 
	The Regional and Checklist sections are not required when hiring a dependent.
42.	Click the VA Person Info tab and click the Expand button to view the VA Person Info section. 
	The VA Person Info section displays. 

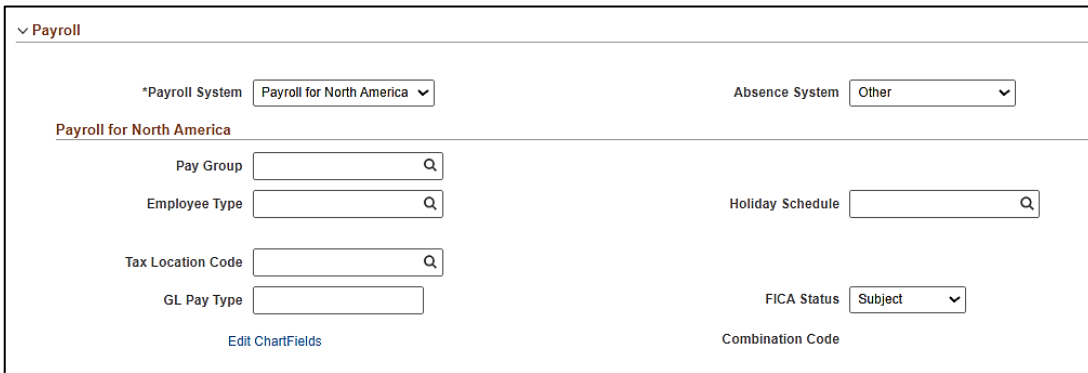
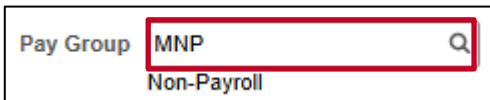
Step	Action
43.	Enter the Employee ID of the retiree to be linked to the dependent in the Linked Participant EmplID field and tab out of the field. 
	If more than one dependent needs to be linked, refer to the Job Aid titled BN361 Linking Dependents and Retirees, located on the Cardinal website under 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. 

Step	Action
	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.
The Create Employee (Step 2 of 3: Job Data) page displays with the Work Location section displayed by default. 	
	Cardinal will auto-assign the Employee ID Number for the dependent. Make note of the Employee ID Number for future use. 
46.	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. 

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. Confirm that the effective date matches the Job Begin Date on the New Hire paperwork. Confirm that the effective date matches the Job Begin Date on the New Hire paperwork. Otherwise, correction by the Cardinal PPS Team would be required 
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. 

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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. Tax Location Code
	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.  Work Location  Job Information  Salary and Compensation  Payroll  Employment Data  Benefit Program  COV Specific  Validation

The **Benefit Program Participation** section displays.

Benefit Program

Benefit Record Number

*Benefits System

Benefits Administration

Benefits Employee Status

Active

Annual Benefits Base Rate

USD

Enter or update the ACA Eligibility details from the related actions in Job Actions Summary.

Benefits Administration Eligibility

BAS Group ID

Eligible Field 1

Eligible Field 2

Eligible Field 3

Eligible Field 4

Eligible Field 5

Eligible Field 6

Eligible Field 7

Eligible Field 8

Eligible Field 9

Benefit Program Participation Details

Effective Date

06/01/2026

Benefit Program

PSX

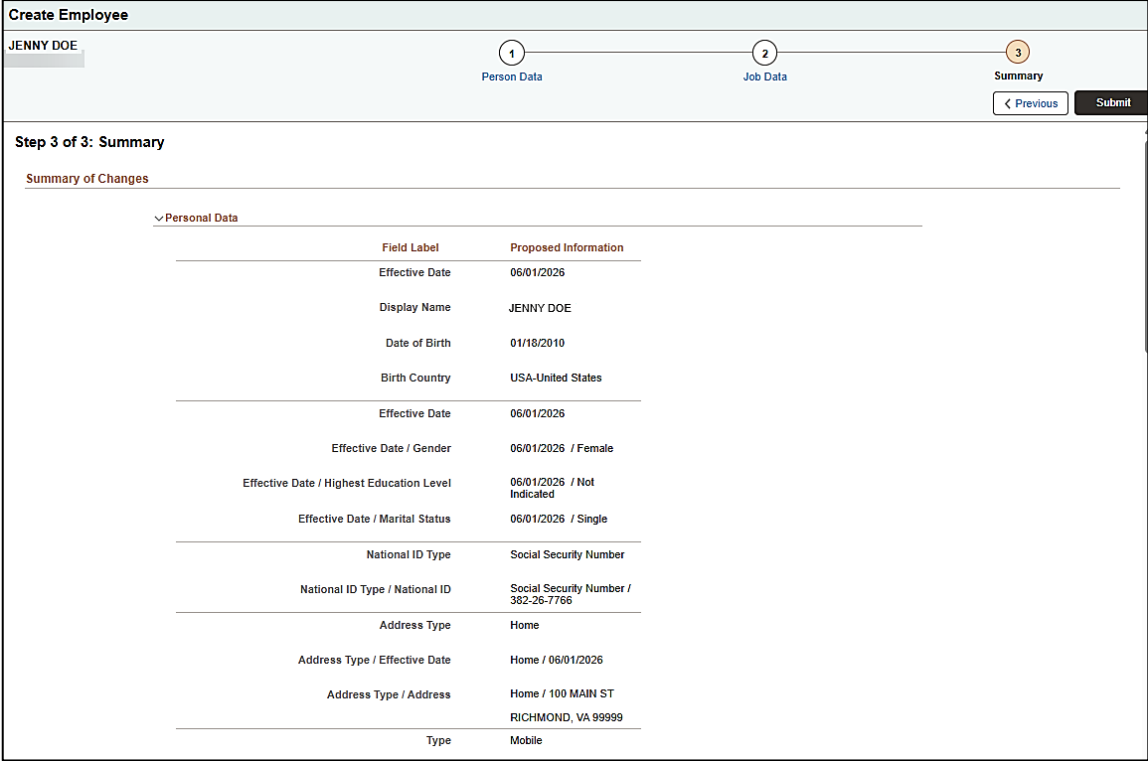
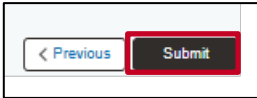
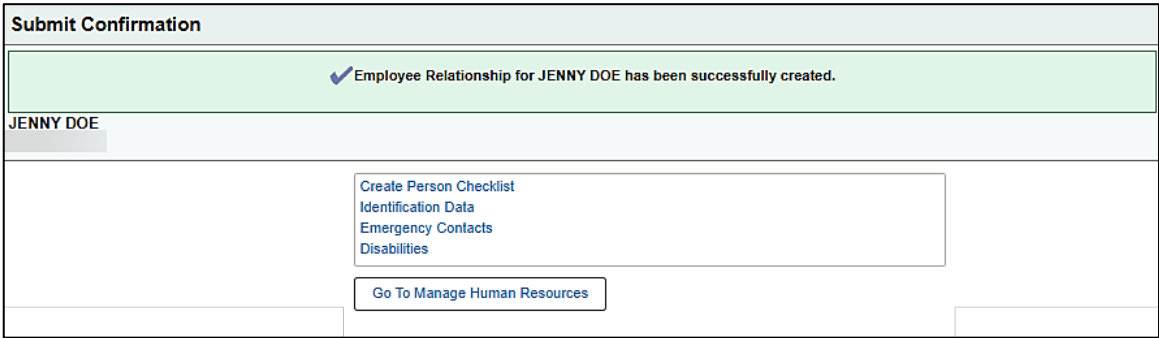
Currency Code

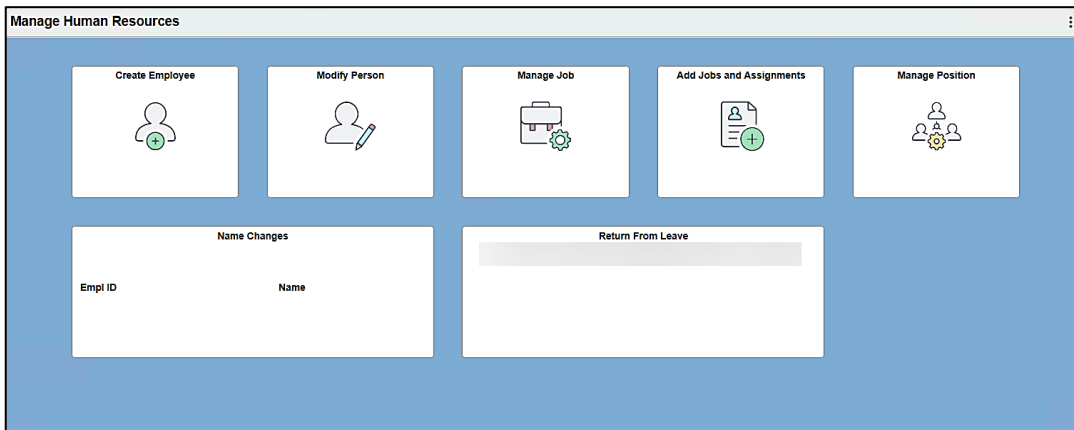
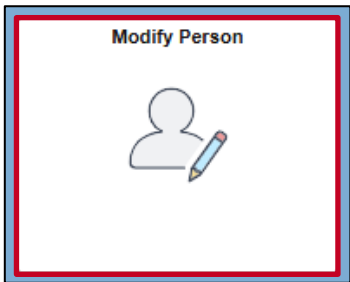
USD

Sys delivered empty Ben Pgm

Step	Action
60.	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”) Benefits Administration Eligibility BAS Group ID Eligible Field 1 Eligible Field 3 Eligible Field 5 Eligible Field 7 Eligible Field 9 Eligible Field 2 Eligible Field 4 Eligible Field 6 Eligible Field 8
61.	Click the Validation tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

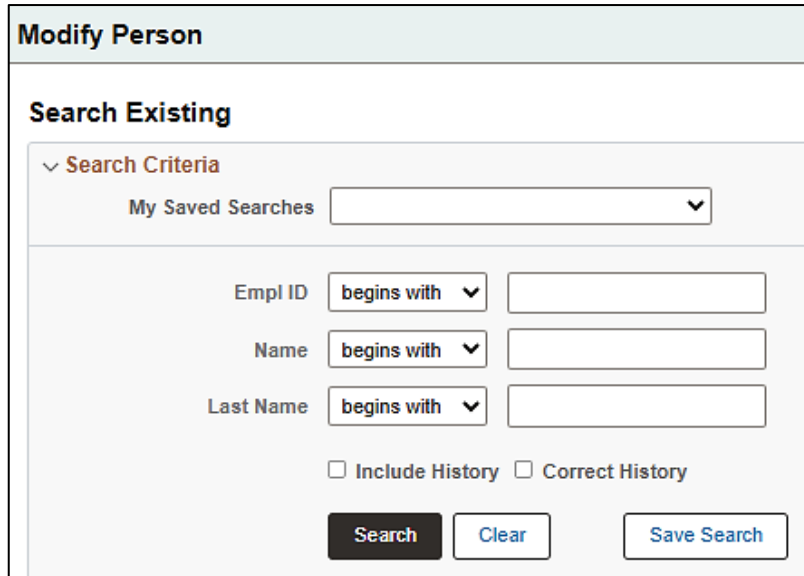
Step	Action								
	The Validation section displays. Validation Validation Messages Currently there are no exceptions to be displayed.								
62.	Click the Next button. 1 Person Data 2 Job Data 3 Summary < Previous Next >								
	The Validation Messages display. Validation Messages ☐ Proceed with warning Validation Successful with warnings 3 rows <table> <tr> <th>Message Severity</th> <th>Message Text</th> </tr> <tr> <td>1 Warning</td> <td>Warning --</td> </tr> <tr> <td>2 Warning</td> <td>Warning -- Compensation Frequency has been updated. (1010,264)</td> </tr> <tr> <td>3 Warning</td> <td>Warning -- You have updated job information that is relevant to compensation defaulting on job row 1. (1000,910)</td> </tr> </table>	Message Severity	Message Text	1 Warning	Warning --	2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)	3 Warning	Warning -- You have updated job information that is relevant to compensation defaulting on job row 1. (1000,910)
Message Severity	Message Text								
1 Warning	Warning --								
2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)								
3 Warning	Warning -- You have updated job information that is relevant to compensation defaulting on job row 1. (1000,910)								
63.	Review the Validation Messages and click the Next button. Next > 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. Validation Validation Messages Validation failed 3 rows <table> <tr> <th>Message Severity</th> <th>Message Text</th> </tr> <tr> <td>1 Warning</td> <td>Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.</td> </tr> <tr> <td>2 Warning</td> <td>Warning -- Compensation Frequency has been updated. (1010,264)</td> </tr> <tr> <td>3 Error</td> <td>Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)</td> </tr> </table> Validation Messages ☒ Proceed with warning Validation Successful with warnings	Message Severity	Message Text	1 Warning	Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.	2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)	3 Error	Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)
Message Severity	Message Text								
1 Warning	Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.								
2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)								
3 Error	Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)								

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

Step	Action
	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.



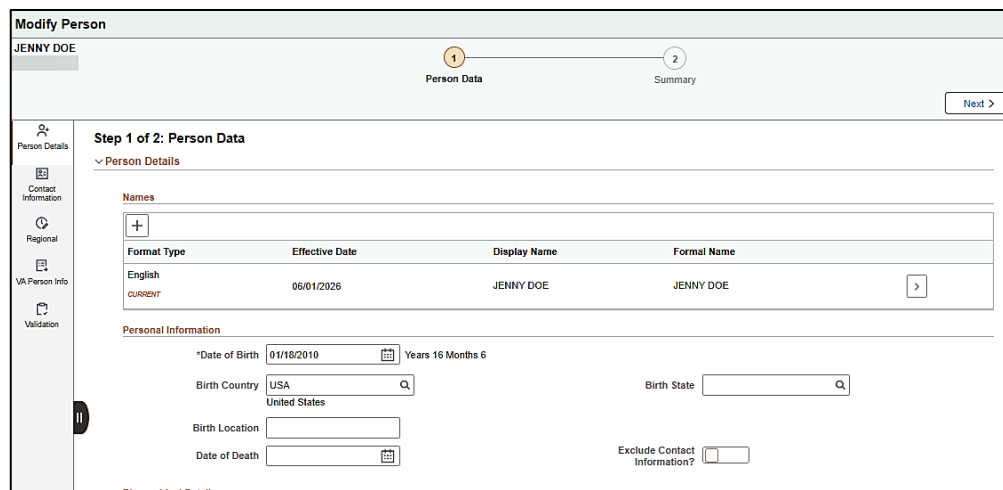
67. Enter the Employee ID for the dependent in the **Empl ID** field.

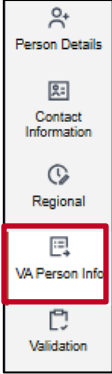
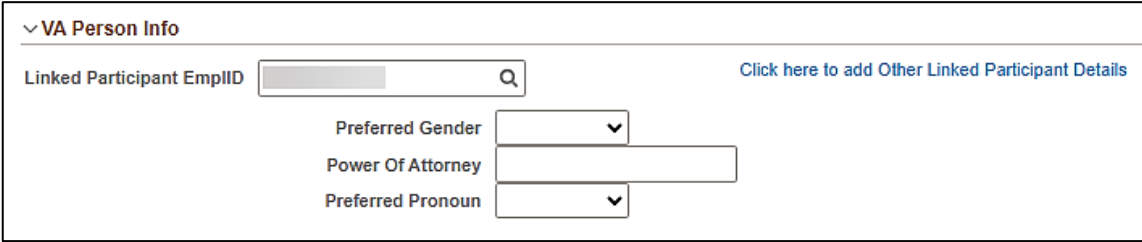


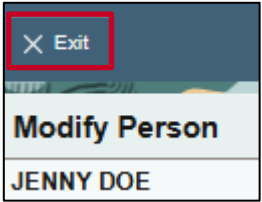
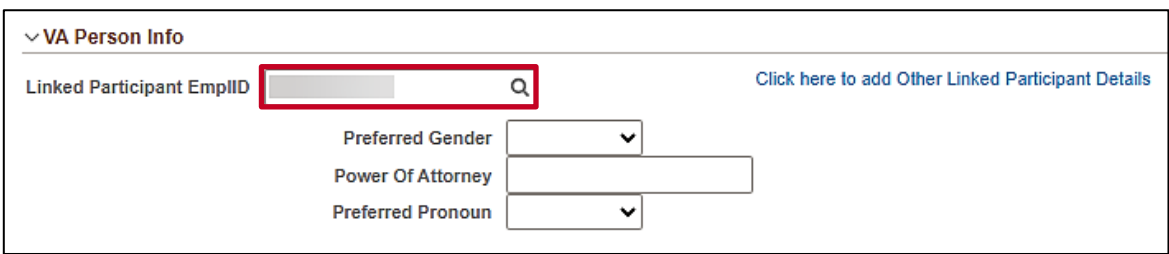
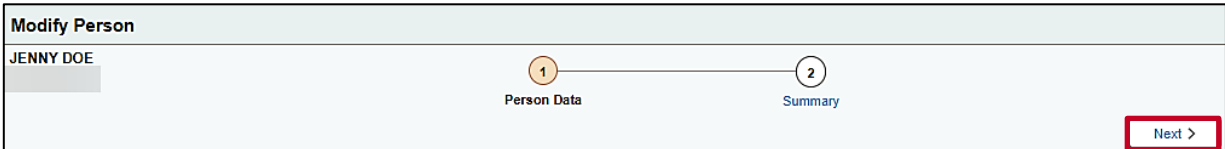
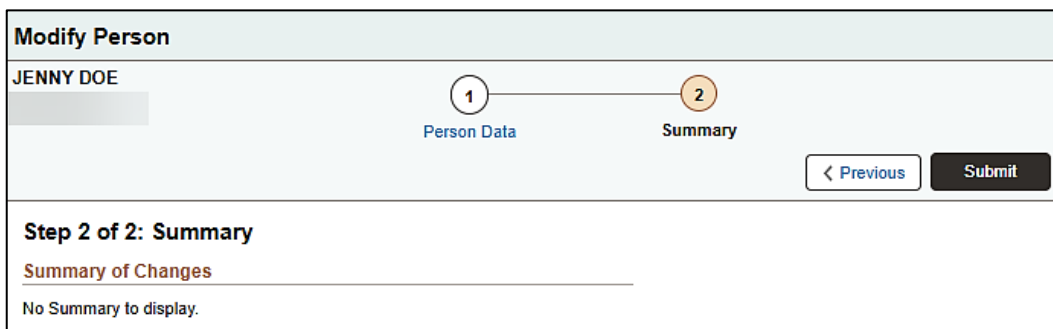
68. Click the **Search** button.



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. 	

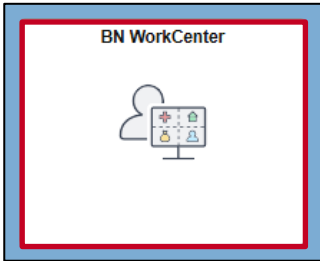
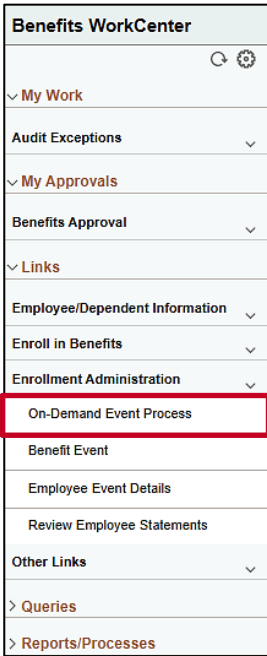
Step	Action
71.	Validate that the retiree's Employee ID is populated in the Linked Participant EmplID field and click the Exit button. This process is complete.  If the retiree's Employee ID is NOT populated, enter it in the Linked Participant EmplID field, and continue to the next step. 
72.	Click the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

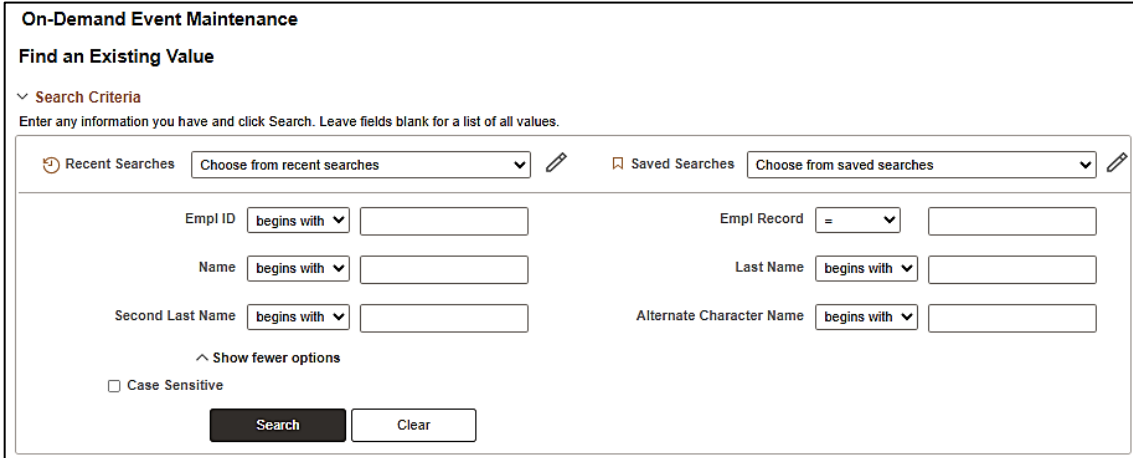
Step	Action
	The Submit Confirmation page displays. Submit Confirmation  Person Data for JENNY DOE has been successfully submitted. JENNY DOE Identification Data Disabilities Emergency Contacts Go To Manage Human Resources

Enrolling the Dependent(s) in Benefits

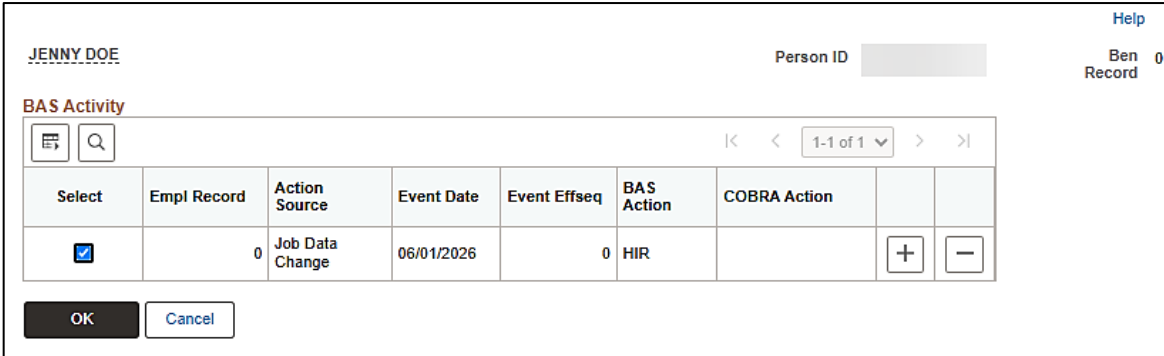
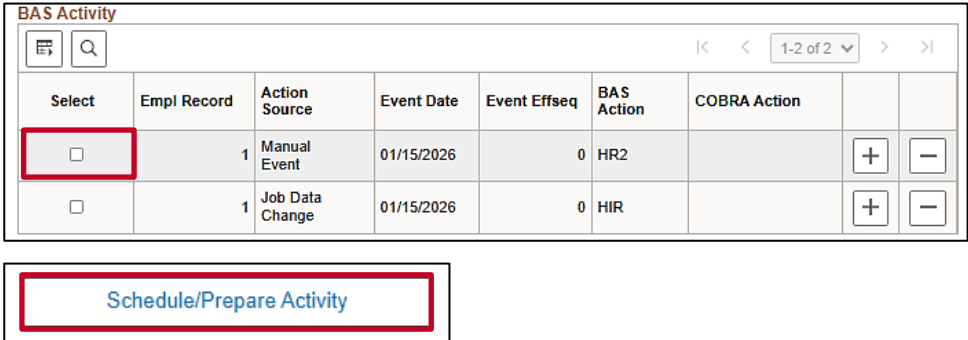
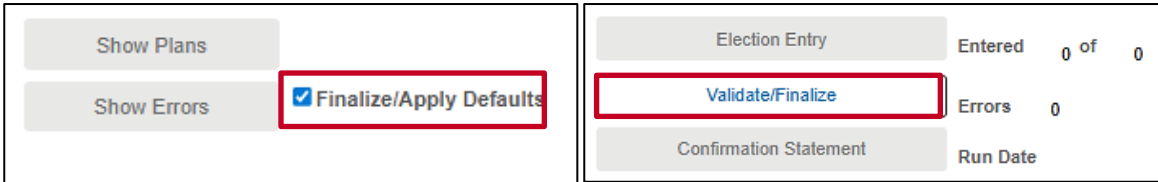
The next step is to enroll the newly hired, youngest dependent in benefits, and add the retiree's spouse and any other eligible dependents. This transaction is completed by a BN Administrator after the Ben Admin process runs (every 4 hours).

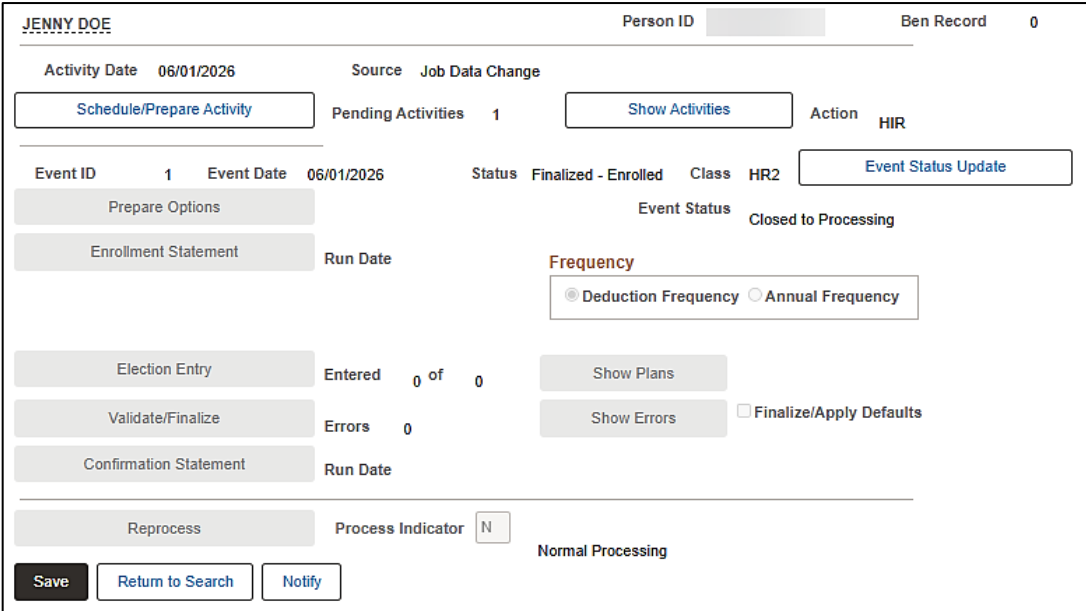
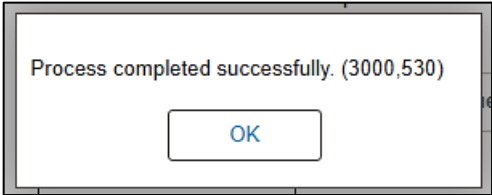
Note: Not all pages in this process are available from the **Benefits WorkCenter**. Therefore, this Job Aid may use both the **WorkCenter** and the **NavBar** to navigate to the applicable pages.

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
	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. 
	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. 
	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.

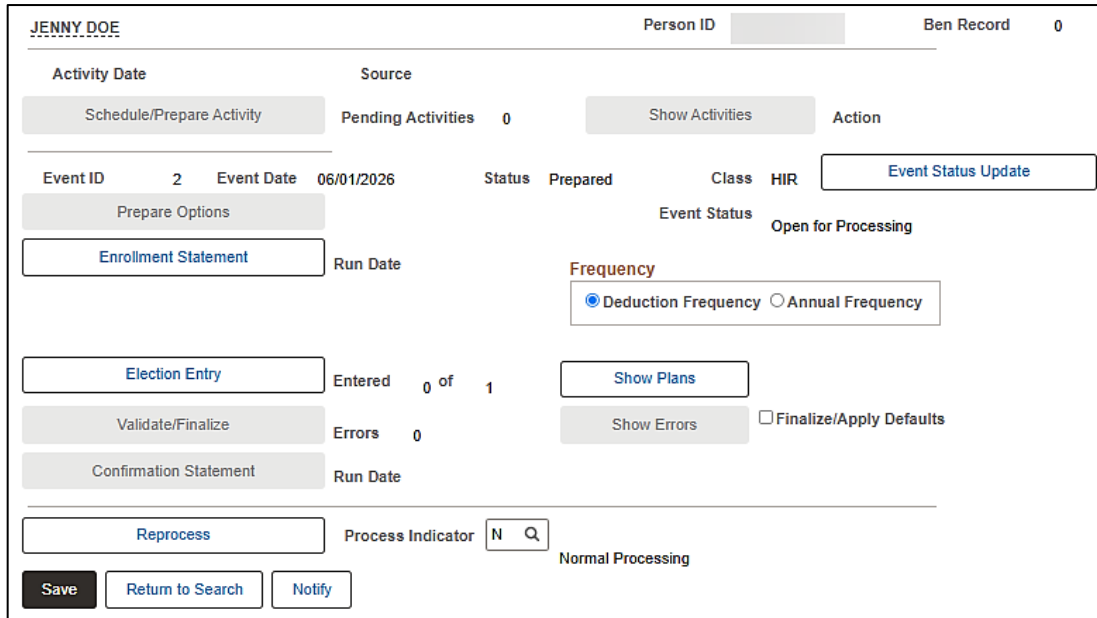
Step	Action
7.	Enter the dependent's Employee ID in the Empl ID field. Note: Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Empl ID begins with ▾
8.	Click the Search button. Search Clear
The On-Demand Event Process page displays for the newly hired, youngest dependent. JENNY DOE Person ID Ben Record 0 Activity Date 06/01/2026 Source Job Data Change Schedule/Prepare Activity Pending Activities 1 Show Activities Action HIR Event ID 1 Event Date 06/01/2026 Status Finalized - Enrolled Class HR2 Event Status Update Prepare Options Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify	
9.	Click the Show Activities button. Show Activities

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 redisplay. 
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 redisplay.



JENNY DOE Person ID [] Ben Record 0

Activity Date Source

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 06/01/2026 Status Prepared Class HIR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

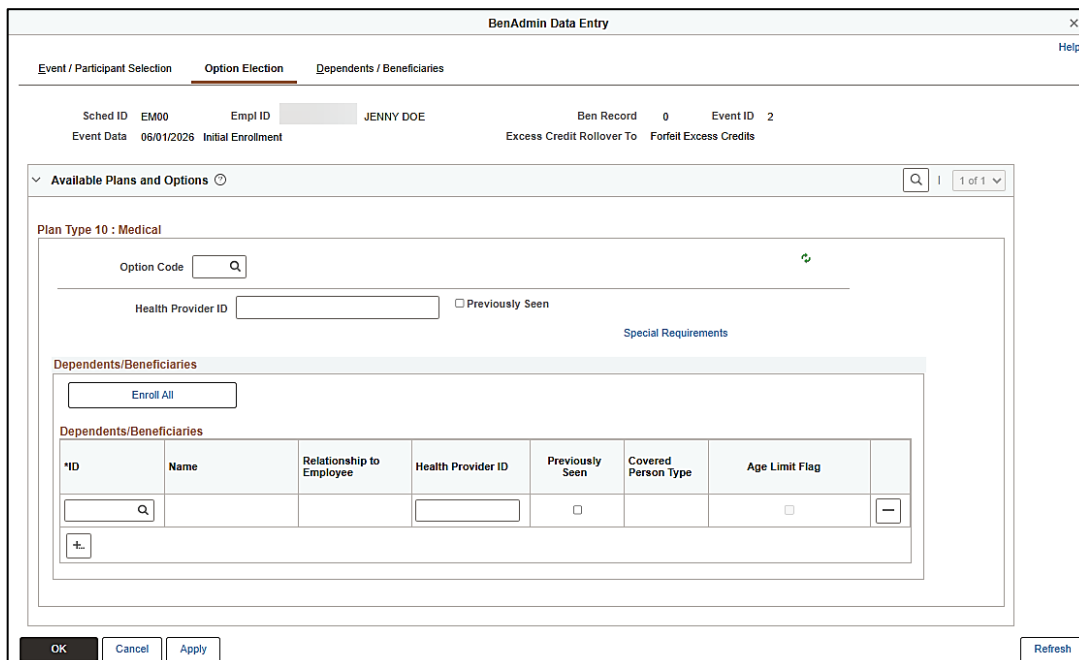
Save Return to Search Notify

13. Click the **Election Entry** button.



Election Entry

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



BenAdmin Data Entry

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

Sched ID EM00 Empl ID JENNY DOE Ben Record 0 Event ID 2

Event Data 06/01/2026 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code []

Health Provider ID [] ☐ Previously Seen

Special Requirements

Dependents/Beneficiaries

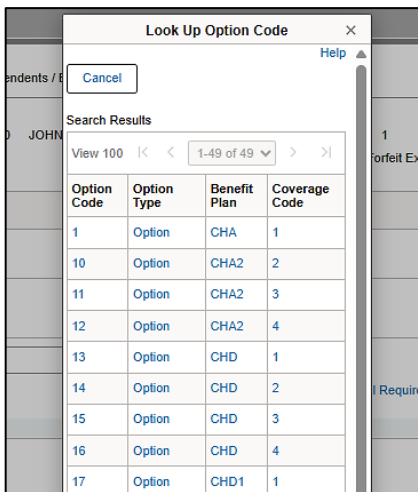
Enroll All

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
[]	[]	[]	[]	☐	[]	☐

OK Cancel Apply Refresh

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

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



Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1

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)

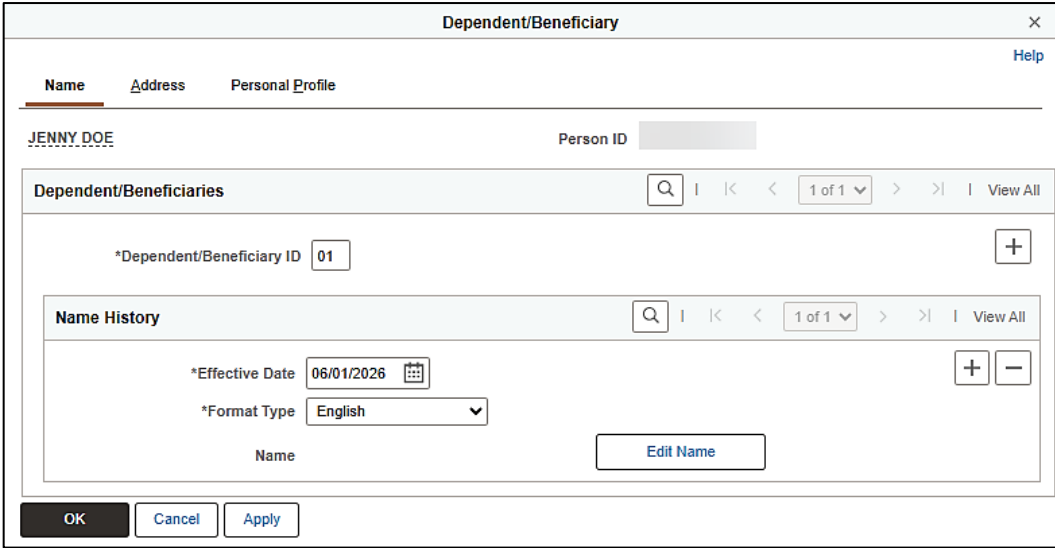
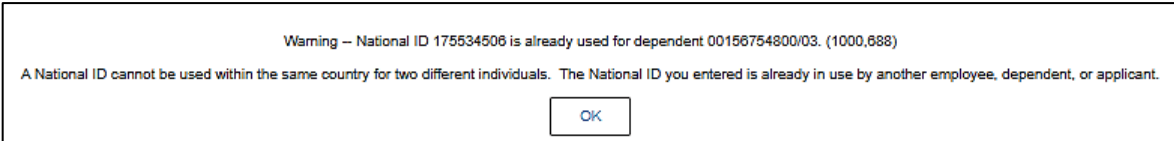
Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4

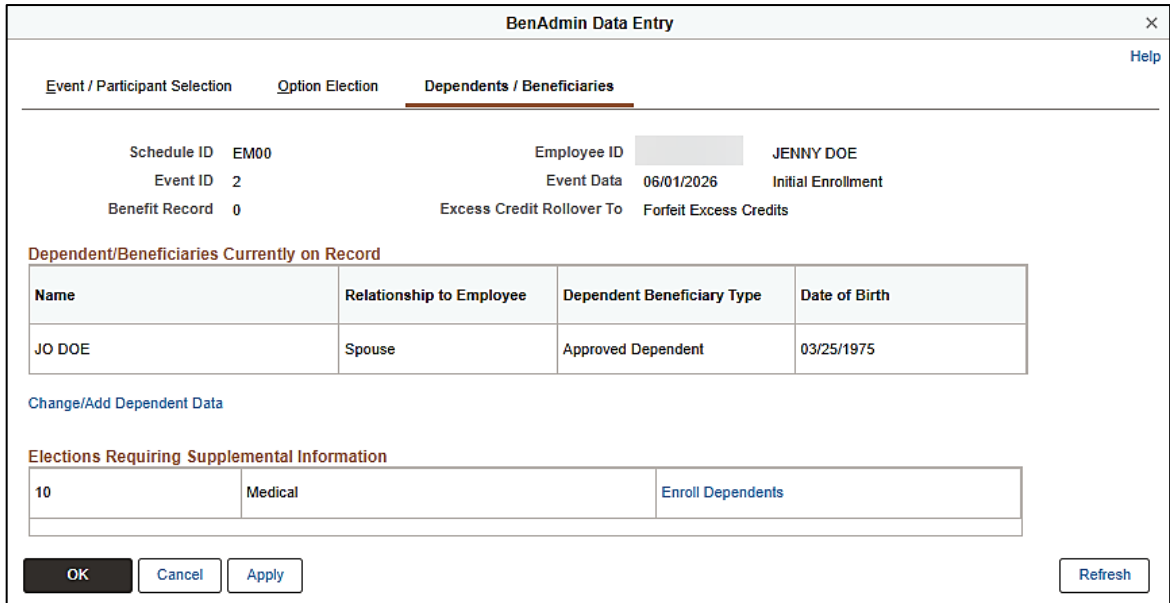
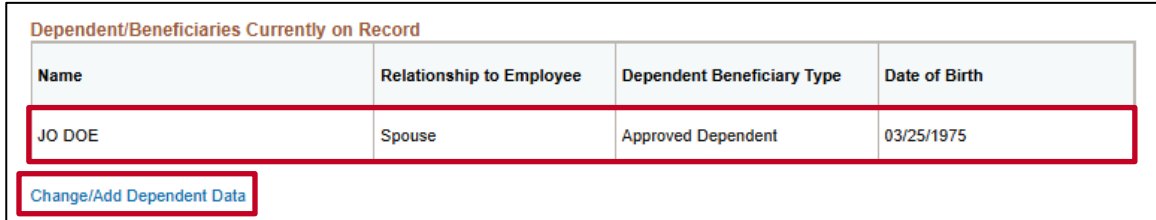
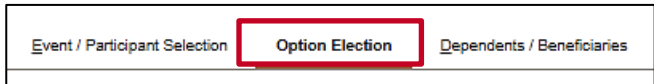


Benefits Job Aid

BN361 ORP Retiree Guide

Step	Action											
	The Plan Type 10: Medical section redisplay with the selected Option Code displayed. Plan Type 10 : Medical Option Code 10 COVA HlthAwr + Exp Den (CHA2) (Self + Spouse) Health Provider ID ☐ Previously Seen											
16.	Click the Dependents / Beneficiaries tab. Event / Participant Selection Option Election Dependents / Beneficiaries											
	The Dependents / Beneficiaries page displays. BenAdmin Data Entry Event / Participant Selection Option Election Dependents / Beneficiaries Schedule ID EM00 Employee ID JENNY DOE Event ID 2 Event Data 06/01/2026 Initial Enrollment Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits Dependent/Beneficiaries Currently on Record <table><thead><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td></tr></tbody></table> Change/Add Dependent Data Elections Requiring Supplemental Information <table><tr><td>10</td><td>Medical</td><td>Enroll Dependents</td></tr></table> OK Cancel Apply Refresh	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth					10	Medical	Enroll Dependents
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth									
10	Medical	Enroll Dependents										
17.	Click the Change/Add Dependent Data link. Dependent/Beneficiaries Currently on Record <table><thead><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td></tr></tbody></table> Change/Add Dependent Data	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth							
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth									

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.
	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. 

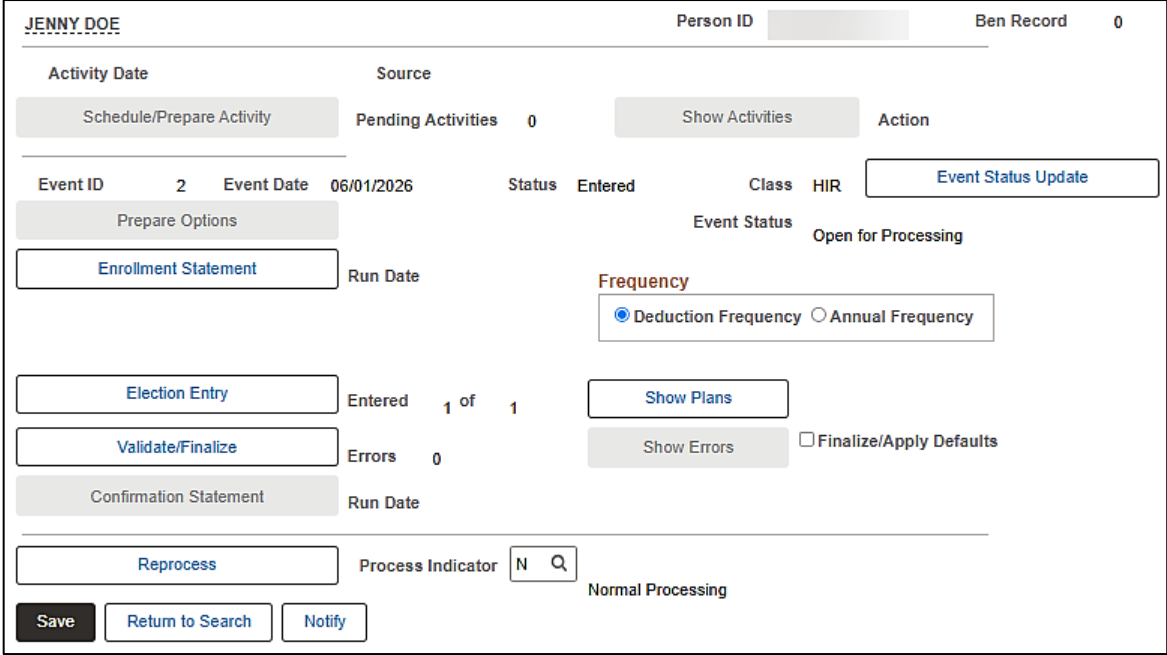
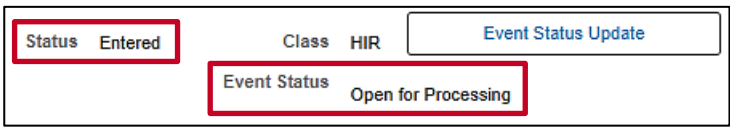
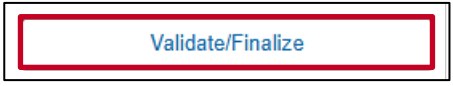
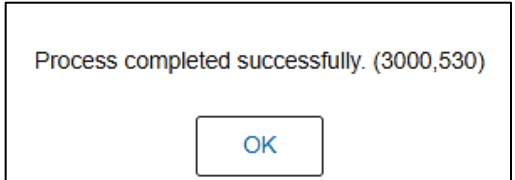
Step	Action
	Once the dependent(s) information is entered, the BenAdmin Data Entry page redisplay. 
20.	Review the Dependent/Beneficiaries Currently on Record section for accuracy. If it is incorrect, click the Change/Add Dependent Data link and make the necessary corrections. 
21.	Click the Option Election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

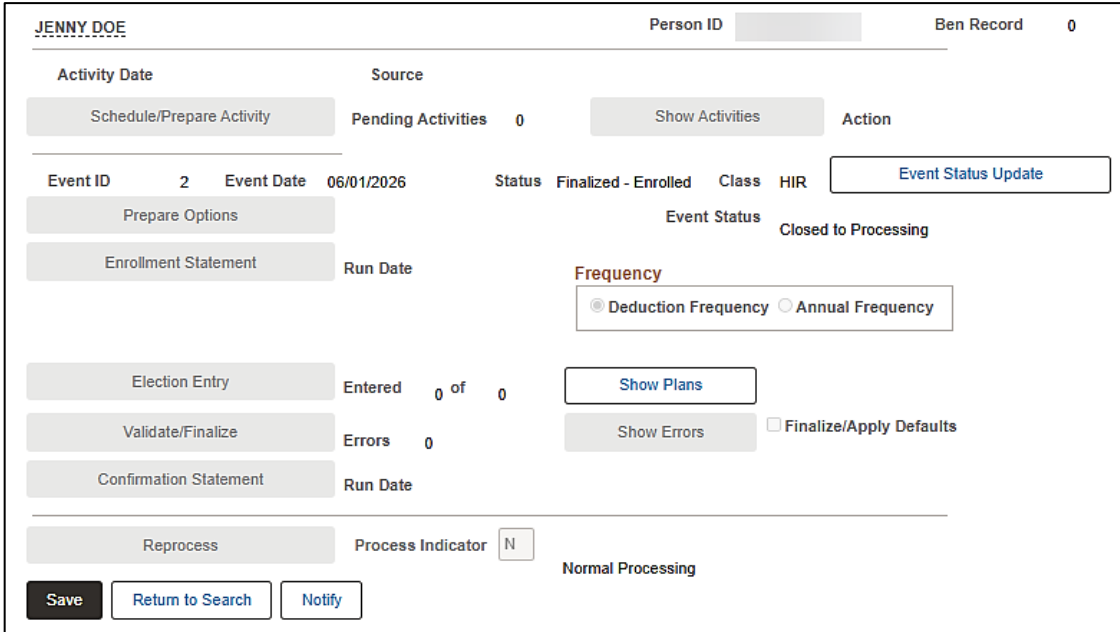


Benefits Job Aid

BN361 ORP Retiree Guide

Step	Action																
	The Option Election page displays. BenAdmin Data Entry Event / Participant Selection Option Election Dependents / Beneficiaries Sched ID EM00 Empl ID [REDACTED] JENNY DOE Ben Record 0 Event ID 2 Event Data 06/01/2026 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits Available Plans and Options Plan Type 10 : Medical Option Code 10 COVA HlthAwrr + Exp Den (CHAZ) (Self + Spouse) Health Provider ID [REDACTED] ☐ Previously Seen Special Requirements Dependents/Beneficiaries Enroll All <table border="1"><thead><tr><th>*ID</th><th>Name</th><th>Relationship to Employee</th><th>Health Provider ID</th><th>Previously Seen</th><th>Covered Person Type</th><th>Age Limit Flag</th><th></th></tr></thead><tbody><tr><td>[REDACTED]</td><td></td><td></td><td>[REDACTED]</td><td>☐</td><td></td><td>☐</td><td>—</td></tr></tbody></table> OK Cancel Apply Refresh	*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		[REDACTED]			[REDACTED]	☐		☐	—
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag											
[REDACTED]			[REDACTED]	☐		☐	—										
22.	Click the Enroll All button. Dependents/Beneficiaries Enroll All																
	The enrolled dependent(s) display(s) in the Dependents/Beneficiaries section. Dependents/Beneficiaries <table border="1"><thead><tr><th>*ID</th><th>Name</th><th>Relationship to Employee</th><th>Health Provider ID</th><th>Previously Seen</th><th>Covered Person Type</th><th>Age Limit Flag</th><th></th></tr></thead><tbody><tr><td>01</td><td>JO DOE</td><td>Spouse</td><td>[REDACTED]</td><td>☐</td><td>Spouse</td><td>☐</td><td>—</td></tr></tbody></table>	*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		01	JO DOE	Spouse	[REDACTED]	☐	Spouse	☐	—
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag											
01	JO DOE	Spouse	[REDACTED]	☐	Spouse	☐	—										
23.	Click the OK button. OK Cancel Apply																

Step	Action
	The On-Demand Event Process page redisplay. 
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 redisplay. 	
27.	Confirm that the Status field is “Finalized – Enrolled” and the Event Status field is “Closed to Processing”. 