



#### Processing a Life Event During Open Enrollment Overview

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take when processing a Life Event during Open Enrollment (OE). These actions will ensure that the Life Event changes are reflected in the OE elections and are transmitted to the vendors.

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

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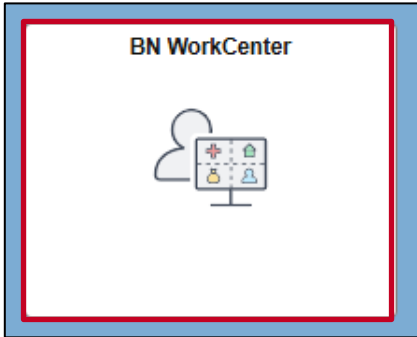
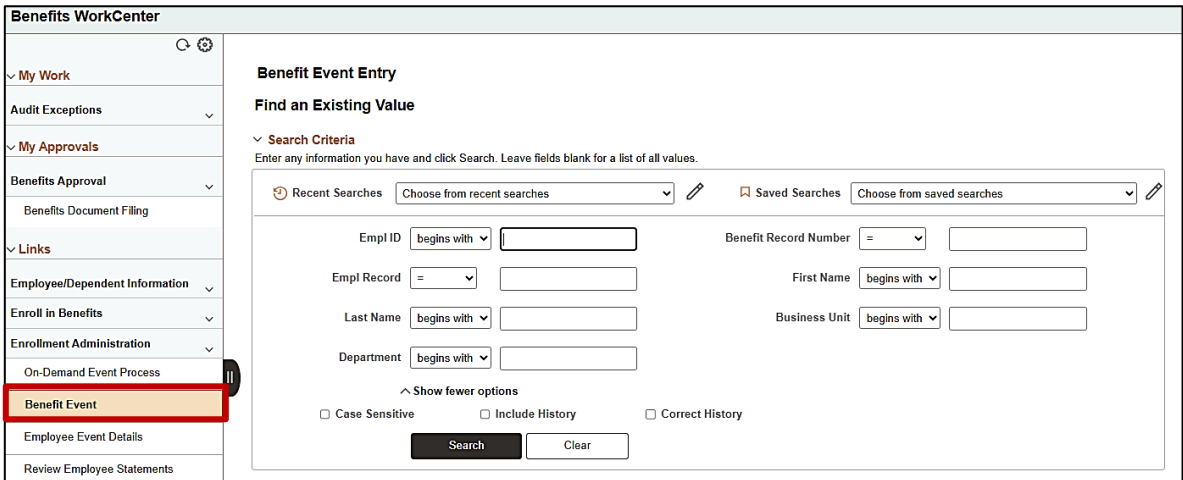
#### Revision History

| Revision Date | Summary of Changes                                                                                                                        |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| 9/1/2026      | Updated to reflect the Cardinal system upgrades.                                                                                          |
| 3/1/2025      | Updated the screenshots of the Search pages. Added reference information to the <b>Overview of the Cardinal HCM Search Pages</b> Job Aid. |

## BN361 Processing a Life Event During Open Enrollment

### Processing a Life Event During Open Enrollment (OE)

Prior to entering a Life Event, the user must review the employee's OE selections and document any changes made during OE for both Health and FSA (Medical and Dependent Care).

| Step                                                                               | Action                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.                                                                                 | <p>Navigate to the <b>Benefit Event</b> page by clicking the <b>BN WorkCenter</b> tile.</p>                                                                                                                                             |
|  | <p>For more information pertaining to WorkCenters, see the Job Aid titled <b>Overview of the Cardinal HCM WorkCenters</b> located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>                                                                                                                  |
| 2.                                                                                 | <p>Use the following navigation path in the WorkCenter: <b>Links &gt; Enrollment Administration &gt; Benefit Event</b></p> <p><b>Note:</b> WorkCenter sections, folders, and pages may vary based on the user's Security roles.</p>  |

| Step                                                                                | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                     | <p>The <b>Benefit Event Entry Find an Existing Value Search</b> page displays.</p> <div data-bbox="175 417 1458 997"> <p><b>Benefit Event Entry</b><br/> <b>Find an Existing Value</b></p> <p>▼ <b>Search Criteria</b><br/> Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div> <div>Recent Searches Choose from recent searches ▼</div> <div>Saved Searches Choose from saved searches ▼</div> </div> <div> <div>Empl ID begins with ▼</div> <div>Benefit Record Number = ▼</div> <div>Empl Record = ▼</div> <div>First Name begins with ▼</div> <div>Last Name begins with ▼</div> <div>Business Unit begins with ▼</div> <div>Department begins with ▼</div> </div> <p>^ Show fewer options</p> <p><input type="checkbox"/> Case Sensitive <input type="checkbox"/> Include History</p> <p><b>Search</b> Clear</p> </div> |
|  | For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled <b>Overview of the Cardinal HCM Search Pages</b> . This Job Aid is located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 3.                                                                                  | <p>Enter the employee's Employee ID in the <b>Empl ID</b> field.</p> <p><b>Note:</b> 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.</p> <div data-bbox="290 1335 992 1421"> <div>Empl ID begins with ▼</div> <div></div> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 4.                                                                                  | <p>Click the <b>Search</b> button.</p> <div data-bbox="290 1509 1003 1610"> <div><b>Search</b></div> <div>Clear</div> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |



## Benefits Job Aid

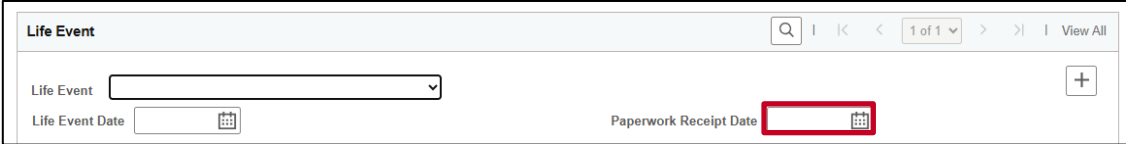
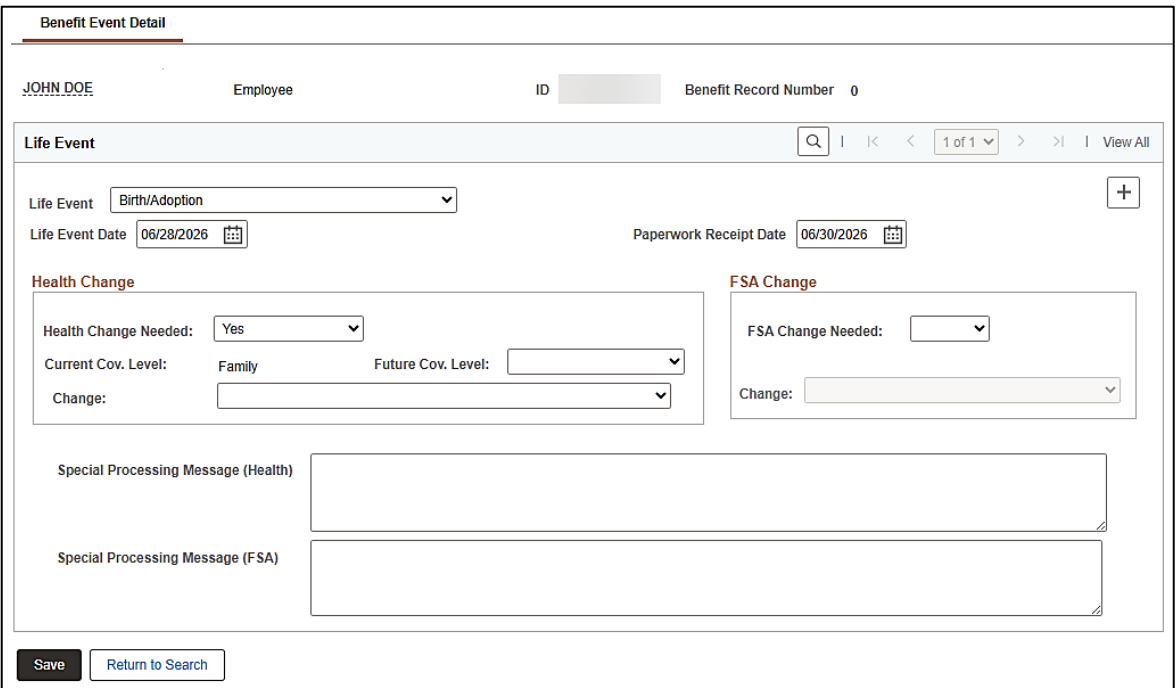
### BN361 Processing a Life Event During Open Enrollment

| Step                                                                                | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                     | <p>The <b>Benefit Event Detail</b> page displays for the applicable employee.</p> <div><p><b>Benefit Event Detail</b></p><p>JOHN DOE Employee ID <span style="border: 1px solid black; padding: 0 20px;"> </span> Benefit Record Number 0</p><p><b>Life Event</b> <span style="float: right;">1 of 1 View All</span></p><p>Life Event <span style="border: 1px solid black; padding: 2px 20px;"> </span> <span style="float: right;">+</span></p><p>Life Event Date <span style="border: 1px solid black; padding: 2px 20px;"> </span> <span style="float: right;">Paperwork Receipt Date <span style="border: 1px solid black; padding: 2px 20px;"> </span></span></p><div><p><b>Health Change</b></p><p>Health Change Needed: <span style="border: 1px solid black; padding: 2px 20px;"> </span></p><p>Current Cov. Level: <span style="border: 1px solid black; padding: 2px 20px;"> </span> Future Cov. Level: <span style="border: 1px solid black; padding: 2px 20px;"> </span></p><p>Change: <span style="border: 1px solid black; padding: 2px 20px;"> </span></p></div><div><p><b>FSA Change</b></p><p>FSA Change Needed: <span style="border: 1px solid black; padding: 2px 20px;"> </span></p><p>Change: <span style="border: 1px solid black; padding: 2px 20px;"> </span></p></div><p>Special Processing Message (Health) <span style="border: 1px solid black; padding: 5px 20px;"> </span></p><p>Special Processing Message (FSA) <span style="border: 1px solid black; padding: 5px 20px;"> </span></p><p><span>Save</span> <span>Return to Search</span></p></div> |
| 5.                                                                                  | <p>Click the <b>Life Event</b> dropdown button and select the applicable life event (“Birth/Adoption” in this scenario).</p> <div><p><b>Life Event</b> <span style="float: right;">1 of 1 View All</span></p><p>Life Event <span style="border: 2px solid red; padding: 2px 20px;"> </span> <span style="float: right;">+</span></p><p>Life Event Date <span style="border: 1px solid black; padding: 2px 20px;"> </span> <span style="float: right;">Paperwork Receipt Date <span style="border: 1px solid black; padding: 2px 20px;"> </span></span></p></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 6.                                                                                  | <p>Click the <b>Life Event Date Calendar</b> icon and select the applicable date.</p> <div><p><b>Life Event</b> <span style="float: right;">1 of 1 View All</span></p><p>Life Event <span style="border: 1px solid black; padding: 2px 20px;"> </span> <span style="float: right;">+</span></p><p>Life Event Date <span style="border: 2px solid red; padding: 2px 20px;"> </span> <span style="float: right;">Paperwork Receipt Date <span style="border: 1px solid black; padding: 2px 20px;"> </span></span></p></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|  | <p>This is the date of the actual event (marriage, birth, divorce, etc.).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |



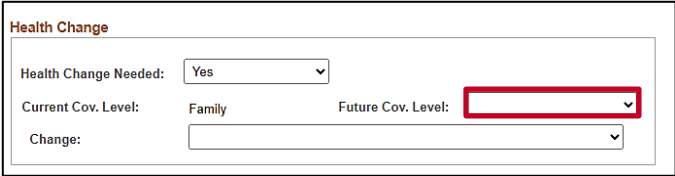
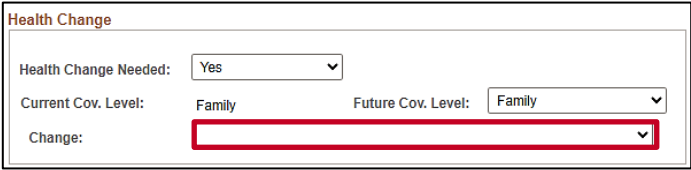
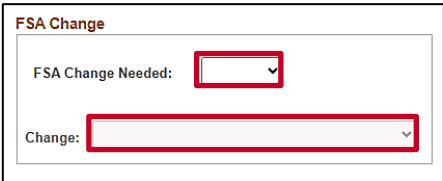
## Benefits Job Aid

### BN361 Processing a Life Event During Open Enrollment

| Step                                                                                                                                        | Action                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7.                                                                                                                                          | <p>Click the <b>Paperwork Receipt Date Calendar</b> icon and select the applicable date.</p>                                                                                                                                                      |
|                                                            | <p>This is the date that the Benefits Enrollment form was received from the employee.</p>                                                                                                                                                                                                                                           |
| 8.                                                                                                                                          | <p>Click the <b>Health Change Needed</b> dropdown button and select “Yes”.</p>                                                                                                                                                                    |
|                                                           | <p>Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes” (e.g., this is a birth event, and the employee is already enrolled in “Family” coverage. However, a new dependent is being added (newborn)). If “Yes” is not selected, a Benefit Event will not be created.</p> |
| <p>The <b>Benefit Event Detail</b> page refreshes.</p>  |                                                                                                                                                                                                                                                                                                                                     |



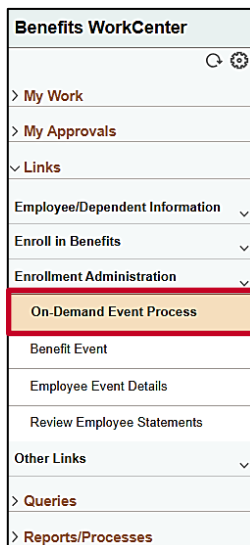
### BN361 Processing a Life Event During Open Enrollment

| Step                                                                                | Action                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | The <b>Current Cov. Level</b> field auto-populates with the employee's current Health Plan enrollment coverage level.                                                                                                                                                                                                                                                                               |
| 9.                                                                                  | <p>Click the <b>Future Cov. Level</b> dropdown button and select the applicable coverage level.</p> <p><b>Note:</b> This does not change the employee's enrollment. This will be done when the Life Event is processed.</p>                                                                                        |
| 10.                                                                                 | <p>Click the <b>Change</b> dropdown button and select the applicable change reason ("Add new child - adoption" in this scenario).</p>                                                                                                                                                                             |
|  | The selections available will vary based on the type of Life Event that is being completed.                                                                                                                                                                                                                                                                                                         |
| 11.                                                                                 | <p>Complete the fields within the <b>FSA Change</b> section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee's FSA elections will be made for this scenario).</p>  |
| 12.                                                                                 | <p>Click the <b>Save</b> button.</p>                                                                                                                                                                                                                                                                             |

## BN361 Processing a Life Event During Open Enrollment

| Step                                                                              | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>After saving, review the messages in the <b>Special Processing Message (Health)</b> and <b>Special Process Message (FSA)</b> fields. These messages will provide next step instructions.</p> <p>If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the <b>Special Processing Message (Health)</b> field and/or the <b>Special Processing Message (FSA)</b> field.</p> <p>The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p> |

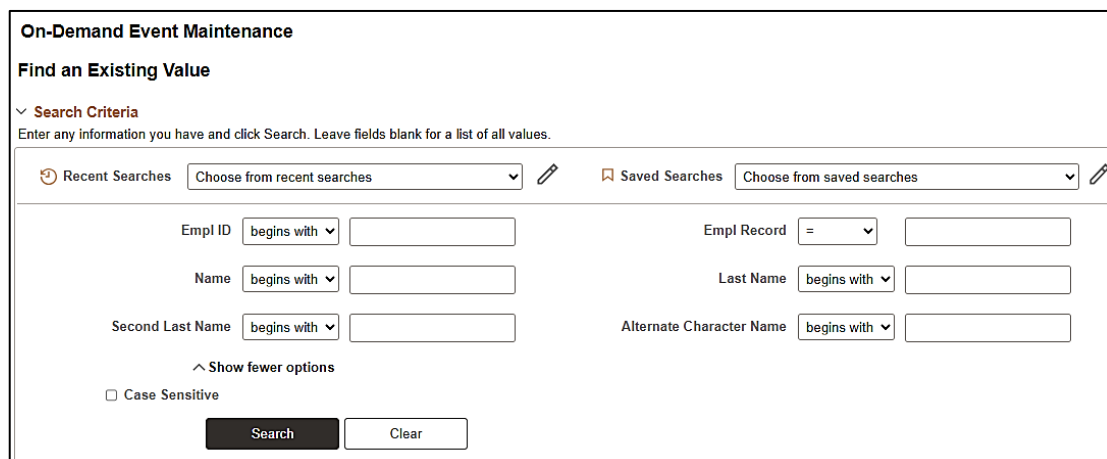
13. Use the following navigation path in the WorkCenter to process the Benefit Event: **Links > Enrollment Administration > On-Demand Event Process**



**Benefits WorkCenter**

- > My Work
- > My Approvals
- ✓ Links
  - Employee/Dependent Information
  - Enroll in Benefits
  - Enrollment Administration
    - On-Demand Event Process**
    - Benefit Event
    - Employee Event Details
    - Review Employee Statements
  - Other Links
- > Queries
- > Reports/Processes

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**



## Benefits Job Aid

### BN361 Processing a Life Event During Open Enrollment

| Step                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Action                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 14.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>Enter the employee's Employee ID in the <b>Empl ID</b> field.</p> <p><b>Note:</b> 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.</p> <div><div>Empl ID</div><div>begins with ▼</div><div></div></div> |
| 15.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>Click the <b>Search</b> button.</p> <div><div>Search</div><div>Clear</div></div>                                                                                                                                                                                                                                                                                            |
| <p>The <b>On-Demand Event Process</b> page displays for the applicable employee.</p> <div><div><div>JOHN DOE</div><div>Person ID</div><div>Ben Record 0</div></div><div><div>Activity Date 06/28/2026</div><div>Source Manual Event</div></div><div><div>Schedule/Prepare Activity</div><div>Pending Activities 1</div><div>Show Activities</div><div>Action BIR</div></div><div><div>Event ID 0</div><div>Event Date 07/01/2026</div><div>Status Prepared</div><div>Class OE</div><div>Event Status Update</div></div><div><div>Prepare Options</div><div>Enrollment Statement</div><div>Run Date</div><div>Frequency</div><div><input checked="" type="radio"/> Deduction Frequency <input type="radio"/> Annual Frequency</div></div><div><div>Election Entry</div><div>Entered 0 of 4</div><div>Show Plans</div></div><div><div>Validate/Finalize</div><div>Errors 0</div><div>Show Errors</div><div><input type="checkbox"/> Finalize/Apply Defaults</div></div><div><div>Confirmation Statement</div><div>Run Date</div></div><div><div>Reprocess</div><div>Process Indicator N</div><div>Normal Processing</div></div><div><div>Save</div><div>Return to Search</div><div>Notify</div></div></div> |                                                                                                                                                                                                                                                                                                                                                                                |
| 16.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>Click the <b>Schedule/Prepare Activity</b> button.</p> <div><div>Schedule/Prepare Activity</div></div>                                                                                                                                                                                                                                                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p>If the <b>Schedule/Prepare Activity</b> button is disabled, the Ben Admin process has already prepared the Benefit Event. Proceed to <b>Step 18</b>.</p>                                                                                                                                                                                                                    |

**BN361 Processing a Life Event During Open Enrollment**

| Step                                                                              | Action                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                   | <p>A <b>Confirmation</b> message displays in a pop-up window once the manual Benefits Administration process completes.</p> <div data-bbox="518 451 1109 680"> <p>Process completed successfully. (3000,530)</p> <p>OK</p> </div>                                                                                               |
| 17.                                                                               | <p>Click the <b>OK</b> button to close the message.</p> <div data-bbox="300 768 483 869"> <p>OK</p> </div>                                                                                                                                                                                                                      |
|  | <p>The <b>Status</b> field now displays “Prepared” and the <b>Event Status</b> field now displays “Open for Processing”.</p> <div data-bbox="290 987 1245 1127"> <p> <b>Status</b> Prepared      <b>Class</b> BIR      <a href="#">Event Status Update</a> </p> <p> <b>Event Status</b> Open for Processing         </p> </div> |
| 18.                                                                               | <p>Click the <b>Election Entry</b> button.</p> <div data-bbox="292 1218 621 1268"> <p>Election Entry</p> </div>                                                                                                                                                                                                                 |



## BN361 Processing a Life Event During Open Enrollment

| Step | Action |
|------|--------|
|------|--------|

The **BenAdmin Data Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID JOHN DOE Ben Record 0 Event ID 6  
Event Data 06/28/2026 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 36 COVA Care + Expanded Dental (ACC2) (Family)

Health Provider ID  ☐ Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

| *ID | Name     | Relationship to Employee | Health Provider ID   | Previously Seen          | Covered Person Type | Age Limit Flag                      |   |
|-----|----------|--------------------------|----------------------|--------------------------|---------------------|-------------------------------------|---|
| 01  | JO DOE   | Spouse                   | <input type="text"/> | <input type="checkbox"/> | Spouse              | <input type="checkbox"/>            | — |
| 02  | JACK DOE | Child                    | <input type="text"/> | <input type="checkbox"/> | Child               | <input checked="" type="checkbox"/> | — |

OK Cancel Apply Refresh

19. Update the employee's benefit elections as applicable.

**Note:** In this scenario, the coverage code remains "Family" and the additional dependent added ("JANE DOE").

Plan Type 10 : Medical

Option Code 36 COVA Care + Expanded Dental (ACC2) (Family)

Health Provider ID  ☐ Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

| *ID | Name     | Relationship to Employee | Health Provider ID   | Previously Seen          | Covered Person Type | Age Limit Flag                      |   |
|-----|----------|--------------------------|----------------------|--------------------------|---------------------|-------------------------------------|---|
| 01  | JO DOE   | Spouse                   | <input type="text"/> | <input type="checkbox"/> | Spouse              | <input type="checkbox"/>            | — |
| 02  | JACK DOE | Child                    | <input type="text"/> | <input type="checkbox"/> | Child               | <input checked="" type="checkbox"/> | — |
| 03  | JANE DOE | Child                    | <input type="text"/> | <input type="checkbox"/> | Child               | <input checked="" type="checkbox"/> | — |

## BN361 Processing a Life Event During Open Enrollment

| Step                                                                              | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | For more information pertaining to updating benefit elections and adding dependents, see the Job Aid titled <b>BN361 Creating and Completing a Life Event on Behalf of an Employee</b> located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .                                                                                                                                                                                                                                                              |
| 20.                                                                               | <p>Once all of the applicable elections have been updated, click the <b>OK</b> button at the bottom of the page.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> <div style="border: 2px solid red; padding: 2px 10px; background-color: #333; color: white; margin-right: 10px;">OK</div> <div style="border: 1px solid #ccc; padding: 2px 10px; margin-right: 10px; color: #0070C0;">Cancel</div> <div style="border: 1px solid #ccc; padding: 2px 10px; color: #0070C0;">Apply</div> </div> |

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

JOHN DOE
Person ID 
Ben Record 0

Activity Date

Schedule/Prepare Activity

Source

Pending Activities 0

Show Activities

Action

Event ID 6

Event Date 06/28/2026

Status Entered

Class BIR

Event Status

Open for Processing

Event Status Update

Prepare Options

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry

Validate/Finalize

Entered 1 of 1

Errors 0

Show Plans

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Reprocess

Run Date

Process Indicator N Q

Normal Processing

Save

Return to Search

Notify

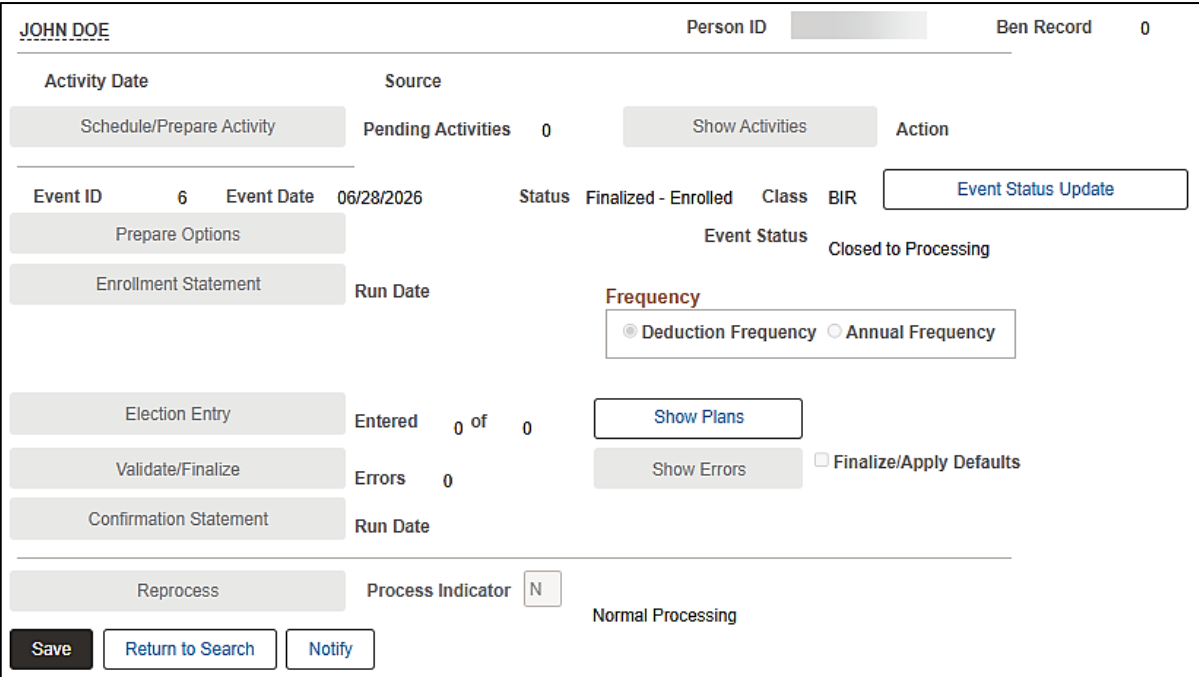
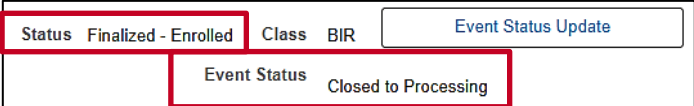
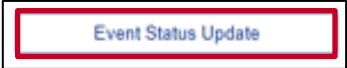
|     |                                                                                                                                                                                                                                     |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 21. | <p>Click the <b>Validate/Finalize</b> button.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> <div style="border: 2px solid red; padding: 2px 10px; color: #0070C0;">Validate/Finalize</div> </div> |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

A **Confirmation** message displays in a pop-up window once the manual Benefits Administration process completes.

Process completed successfully. (3000,530)

OK

## BN361 Processing a Life Event During Open Enrollment

| Step                                                                                                                                          | Action                                                                                                                                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 22.                                                                                                                                           | <p>Click the <b>OK</b> button to close the message.</p>                                                                                      |
| <p>The <b>On-Demand Event Process</b> page redisplay.</p>  |                                                                                                                                                                                                                               |
|                                                            | <p>The <b>Status</b> field now displays “Finalized – Enrolled” and the <b>Event Status</b> field now displays “Closed to Processing”.</p>  |
| 23.                                                                                                                                           | <p>Click the <b>Event Status Update</b> button and review the employee’s Benefit Events.</p>                                               |

## BN361 Processing a Life Event During Open Enrollment

| Step | Action |
|------|--------|
|------|--------|

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

**BenAdmin Event Status Update**
X

Empl ID 00246068300 JOHN DOE
Ben Record 0

**Event Status Update**
Help

Schedule ID PRFX25 ☐ Event Disconnected

Event Date 07/01/2026

Event ID 0

Event Class OE Open Enrollment

Event Priority 900

Benefit Program SAL

Process Status Prepared

Action Source Open Enrollment

☐ Address Eligibility Changed

☐ MultiJob Indicator Changed

☐ Job Eligibility Changed

☒ Event Out of Sequence

☐ Finalize/Apply Defaults

Print Option Print Confirmation Forms Only

\*Process Normal Processing

\*Event Status Open for Processing

---

Schedule ID EM00 ☐ Event Disconnected

Event Date 06/28/2026

Event ID 6

Event Class BIR Birth or Adoption

Event Priority 410

Benefit Program SAL

Process Status Finalized - Enrolled

Action Source Manual Event

☐ Address Eligibility Changed

☐ MultiJob Indicator Changed

☐ Job Eligibility Changed

☐ Event Out of Sequence

☐ Finalize/Apply Defaults

Print Option Print Confirmation Forms Only

\*Process Normal Processing

\*Event Status Closed to Processing

---

Schedule ID 257COV ☐ Event Disconnected

Event Date 07/01/2025

Event ID 0

Event Class OE Open Enrollment

Event Priority 900

Benefit Program SAL

Process Status Finalized - Enrolled

Action Source Open Enrollment

☐ Address Eligibility Changed

☐ MultiJob Indicator Changed

☐ Job Eligibility Changed

☐ Event Out of Sequence

☐ Finalize/Apply Defaults

Print Option Print Confirmation Forms Only

\*Process Normal Processing

\*Event Status Closed to Processing

24. Locate the Benefit Event for the Open Enrollment and then click the corresponding **Process** dropdown button and select "Assign Benefit Program".

\*Process Assign Benefit Program



The next step will wipe away the enrollments the employee made to OE prior to the Life Event. Be sure to have noted the employee's elections. This is an important step because it allows the user to pull in the changes that were made in the Life Event into the OE Enrollment.

## BN361 Processing a Life Event During Open Enrollment

| Step                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Action                                                                                                                     |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| 25.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>Click the <b>OK</b> button at the bottom of the page.</p> <div> <div>OK</div> <div>Cancel</div> <div>Apply</div> </div> |
| <p>The <b>On-Demand Event Maintenance</b> page redispays.</p> <div> <div> <div>JOHN DOE</div> <div>Person ID</div> <div>Ben Record 0</div> </div> <div> <div>Activity Date</div> <div>Source</div> </div> <div> <div>Schedule/Prepare Activity</div> <div>Pending Activities 0</div> <div>Show Activities</div> <div>Action</div> </div> <div> <div>Event ID 0</div> <div>Event Date 07/01/2026</div> <div>Status Prepared</div> <div>Class OE</div> <div>Event Status Update</div> </div> <div> <div>Prepare Options</div> <div>Event Status Open for Processing</div> </div> <div> <div>Enrollment Statement</div> <div>Run Date</div> <div>Frequency</div> <div> <input checked="" type="radio"/> Deduction Frequency           <input type="radio"/> Annual Frequency         </div> </div> <div> <div>Election Entry</div> <div>Entered 0 of 4</div> <div>Show Plans</div> </div> <div> <div>Validate/Finalize</div> <div>Errors 0</div> <div>Show Errors</div> <div> <input type="checkbox"/> Finalize/Apply Defaults         </div> </div> <div> <div>Confirmation Statement</div> <div>Run Date</div> </div> <div> <div>Reprocess</div> <div>Process Indicator A</div> <div>Assign Benefit Program</div> </div> <div> <div>Save</div> <div>Return to Search</div> <div>Notify</div> </div> </div> |                                                                                                                            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <p>The <b>Status</b> field now displays “Prepared”, and the <b>Event Status</b> field displays “Open for Processing”.</p>  |
| 26.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>Click the <b>Reprocess</b> button.</p> <div> <div>Reprocess</div> </div>                                                |
| 27.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>Click the <b>Election Entry</b> button.</p> <div> <div>Election Entry</div> </div>                                      |



## BN361 Processing a Life Event During Open Enrollment

| Step | Action |
|------|--------|
|------|--------|

The **BenAdmin Data Entry** page displays in a pop-up window.

BenAdmin Data Entry

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

Sched ID PRFX25   Empl ID [REDACTED]   JOHN DOE   Ben Record 0   Event ID 0  
Event Data 07/01/2026   Open Enrollment   Excess Credit Rollover To   Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 36   COVA Care + Expanded Dental (ACC2) (Family)  
Health Provider ID   ☐ Previously Seen   [Special Requirements](#)

Dependents/Beneficiaries

[Enroll All](#)

| *ID               | Name     | Relationship to Employee | Health Provider ID | Previously Seen          | Covered Person Type | Age Limit Flag                      |   |
|-------------------|----------|--------------------------|--------------------|--------------------------|---------------------|-------------------------------------|---|
| 01                | JO DOE   | Spouse                   |                    | <input type="checkbox"/> | Spouse              | <input type="checkbox"/>            | — |
| 02                | JACK DOE | Child                    |                    | <input type="checkbox"/> | Child               | <input checked="" type="checkbox"/> | — |
| <a href="#">+</a> |          |                          |                    |                          |                     |                                     |   |

Plan Type 60 : Flex Spending Medical

28.

Validate that the employee's enrollment elections for Open Enrollment (OE) match the Life Event previously entered.

Plan Type 10 : Medical

Option Code 36   COVA Care + Expanded Dental (ACC2) (Family)  
Health Provider ID   ☐ Previously Seen   [Special Requirements](#)

Dependents/Beneficiaries

[Enroll All](#)

| *ID               | Name     | Relationship to Employee | Health Provider ID | Previously Seen          | Covered Person Type | Age Limit Flag                      |   |
|-------------------|----------|--------------------------|--------------------|--------------------------|---------------------|-------------------------------------|---|
| 01                | JO DOE   | Spouse                   |                    | <input type="checkbox"/> | Spouse              | <input type="checkbox"/>            | — |
| 02                | JACK DOE | Child                    |                    | <input type="checkbox"/> | Child               | <input checked="" type="checkbox"/> | — |
| 03                | JANE DOE | Child                    |                    | <input type="checkbox"/> | Child               | <input checked="" type="checkbox"/> | — |
| <a href="#">+</a> |          |                          |                    |                          |                     |                                     |   |

## BN361 Processing a Life Event During Open Enrollment

| Step | Action                                                                                                                                                                                                                                                                                                    |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 29.  | <p>Re-enter any Open Enrollment elections previously entered. Once all of the applicable elections have been updated, click the <b>OK</b> button at the bottom of the page.</p> <div> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> </div> |

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

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 0

Event Date 07/01/2026

Status Entered

Class OE

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

Election Entry

Entered 1 of 4

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



The **Status** field now displays “Entered” and the **Event Status** field still displays “Open for Processing”.

|     |                                                                                                                 |
|-----|-----------------------------------------------------------------------------------------------------------------|
| 30. | <p>Click the <b>Validate/Finalize</b> button.</p> <div> <input type="button" value="Validate/Finalize"/> </div> |
|-----|-----------------------------------------------------------------------------------------------------------------|

A **Confirmation** message displays in a pop-up window once the manual Benefits Administration process completes.

Process completed successfully. (3000,530)

OK

## BN361 Processing a Life Event During Open Enrollment

| Step                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Action                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 31.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <div>Click the <b>OK</b> button to close the message.</div> <div><div>OK</div></div>                                                                            |
| <div>The <b>On-Demand Event Maintenance</b> page redisplay.</div> <div><div><div><div>JOHN DOE</div><div>Person ID<div></div>Ben Record0</div></div><div><div><div>Activity Date</div><div>Source</div></div><div><div>Schedule/Prepare Activity</div><div>Pending Activities0</div><div>Show Activities</div><div>Action</div></div></div><div><div><div>Event ID0</div><div>Event Date07/01/2026</div><div>StatusFinalized - Enrolled</div><div>ClassOE</div><div>Event Status Update</div></div><div><div>Prepare Options</div><div>Event StatusClosed to Processing</div></div><div><div>Enrollment Statement</div><div>Run Date</div><div><div>Frequency</div><div><div><input checked="" type="radio"/> Deduction Frequency</div><div><input type="radio"/> Annual Frequency</div></div></div></div><div><div><div>Election Entry</div><div>Entered0 of 0</div><div>Show Plans</div></div><div><div>Validate/Finalize</div><div>Errors0</div><div>Show Errors</div><div><input type="checkbox"/> Finalize/Apply Defaults</div></div><div><div>Confirmation Statement</div><div>Run Date</div></div></div><div><div><div>Reprocess</div><div>Process IndicatorN</div><div>Normal Processing</div></div><div><div>Save</div><div>Return to Search</div><div>Notify</div></div></div></div></div></div> |                                                                                                                                                                 |
| <div><div>i</div></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <div>Confirm that the <b>Status</b> field now displays “Finalized – Enrolled” and that the <b>Event Status</b> field now displays “Closed to Processing”.</div> |