

Reviewing Employee Benefits Information Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to review the various elements of Benefits information for an employee. This Job Aid contains sections detailing the processes for reviewing each of the following pages:

- **Health Plan Enrollment** page: to review the current, historical, and future dated health benefit enrollments for an employee
- **Simple Benefits** page: to review the current, historical, and future dated premium reward and flex spending admin fee enrollments for an employee
- **Life and AD/D Plan Enrollment** page: to review the imputed life enrollment for an employee
- **Spending Accounts** page: to review the current, historical, and future dated Flex Spending Medical and/or Flex Spending Dependent Care enrollments for an employee
- **Savings Plan** page: to review the current, historical, and future dated Savings Plan enrollments for an employee
- **Retirement Plans** page: to review the current, historical, and future dated Retirement Plan enrollments for an employee
- **Benefits Summary** page: to review all of the current, historical, and future enrollments for an employee

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

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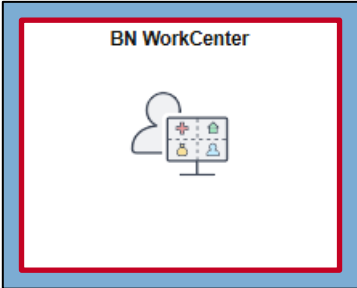
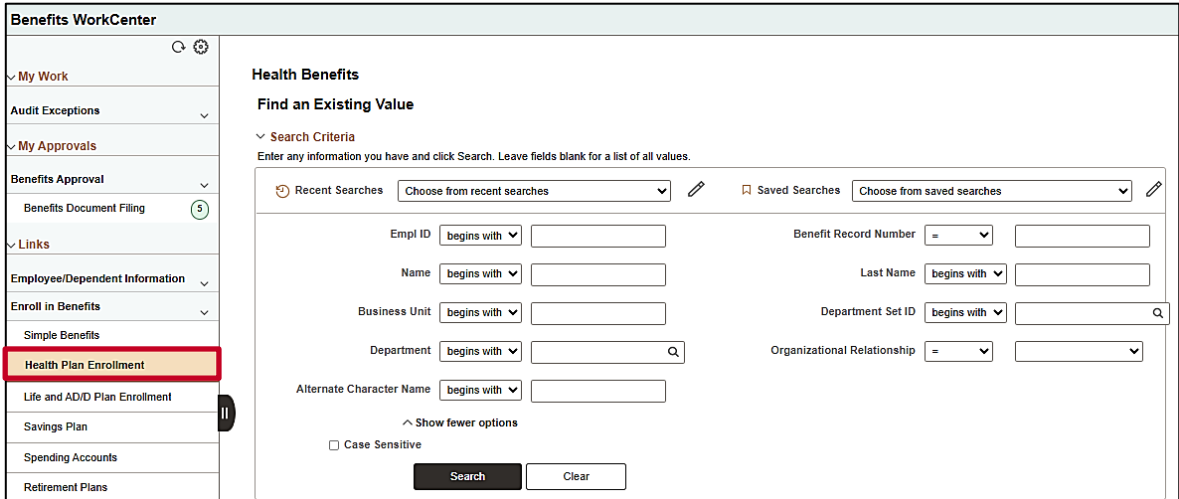
Revision History

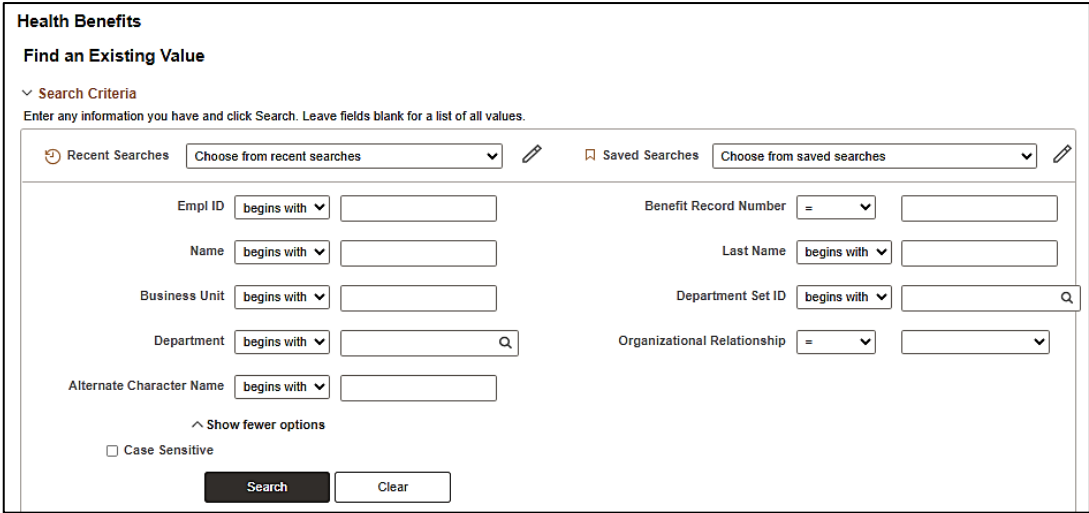
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/12/2026	Cross reference added to the BN361 Linking Dependents to Retirees Job Aid in Section 1 , after Step 5.
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1, Section 2 , after Step 1; Section 3 , after Step 1; Section 4 , after Step 1; Section 5 , after Step 1; Section 6 , after Step 1; Section 7 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Reviewing the Health Plan Enrollment Page

The **Health Plan Enrollment** page is used to review the health plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The enrolled dependents are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Health Plan Enrollment page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enroll in Benefits > Health Plan Enrollment Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

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



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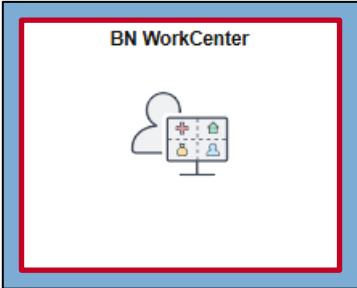
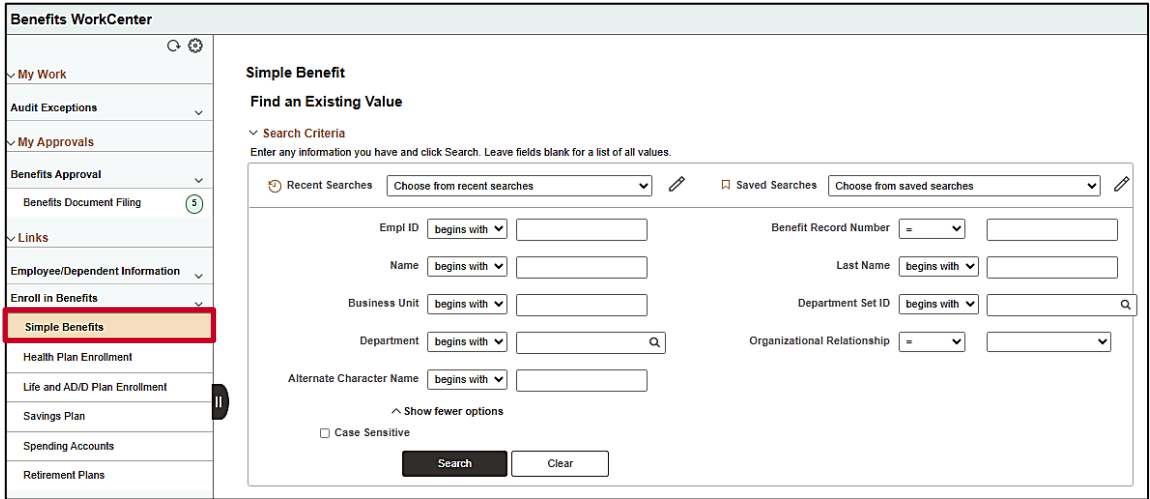
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Step	Action
	The Health Plan Enrollment page displays. Employee ID Benefit Record Number 0 Plan Type Plan Type 10 Medical Coverage Coverage Begin Date 07/01/2020 Deduction Begin Date 07/01/2020 Coverage Election ☒ Elect ☐ Waive ☐ Terminate Election Date 09/28/2021 Benefit Program SAL Salaried Employee Benefit Pgm Benefit Plan ACC0 COVA Care + Prev Dental Option Code 28 Coverage Code 4 Family Health Provider ID ☐ Previously Seen Employee Status Active Enroll All Dependents Dependent/Beneficiaries ID Name Relationship to Employee Health Provider ID Prev Seen Covered Person Type Age Limit Flg
5.	Review the information as needed.
	If a red link appears on this page with the words “THIS PARTICIPANT HAS A LINKED RELATIONSHIP”, this means the employee is a Retiree with one or more Linked Dependent, or a Dependent linked to a Retiree. For more information, refer to the Job Aid titled BN361 Linking Dependents and Retirees on the Cardinal website in Job Aids under Learning. Enroll All Dependents THIS PARTICIPANT HAS A LINKED RELATIONSHIP

Reviewing the Simple Benefits Page

The **Simple Benefits** page is used to review the Premium Reward and Flex Spending Admin Fee enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Simple Benefits page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enroll in Benefits > Simple Benefits Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 



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Step	Action
	The Simple Benefit Find an Existing Value Search page displays. Simple Benefit 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 Benefit Record Number = Name begins with Last Name begins with Business Unit begins with Department Set ID begins with Department begins with Organizational Relationship = Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive 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 employee's Employee ID in the Empl ID field. Note: Users can also search by 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
4.	Click the Search button. Search Clear

BN361 Reviewing Employee Benefits Information

Step	Action
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The **Simple Benefits** page displays.

Employee	ID	Benefit Record Number	0
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Plan Type

|<<<

1 of 2

>>>

|

View All

Plan Type

AY

Health Premium Reward

Coverage

|<<<

1 of 4

>>>

|

View All

Coverage Begin Date

06/30/2024

Deduction Begin Date

06/30/2024

Coverage Election

☐ Elect

☐ Waive

☒ Terminate

Election Date

05/25/2023

Benefit Program

SAL

Salaried Employee Benefit Pgm

Benefit Plan

Save

Return to Search

Notify

Refresh

- Click the **View All** link in order to see all of the enrollments and review the information as needed.

Employee

ID

Benefit Record Number

0

Plan Type

|<

<

1 of 2

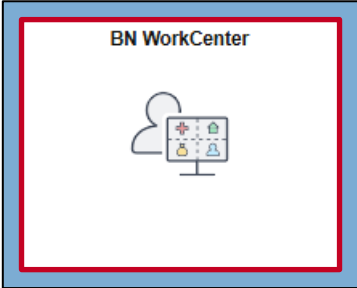
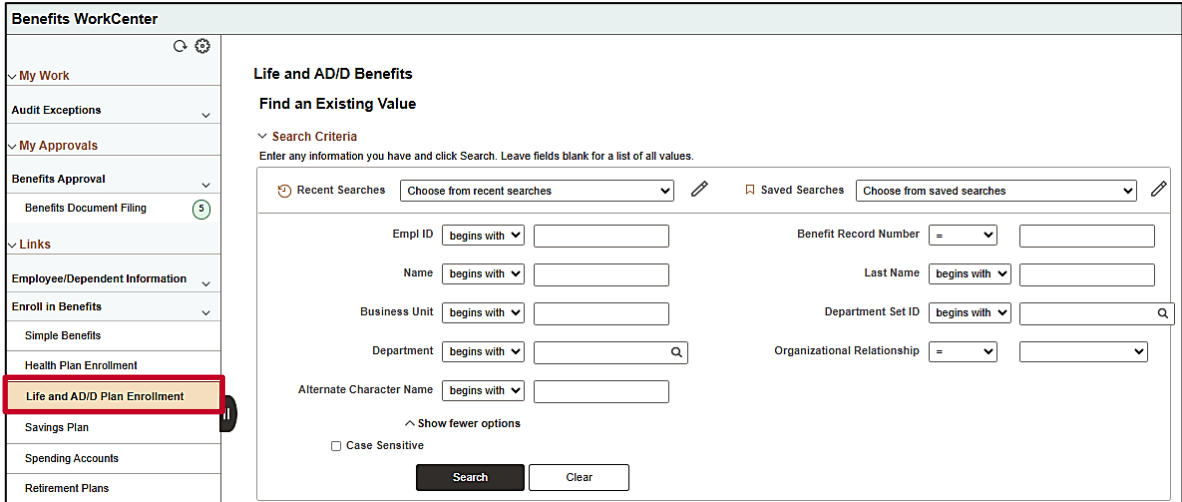
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[View All](#)

Reviewing the Life and AD/D Plan Enrollment Page

The **Life and AD/D Plan Enrollment** page is used to review the Imputed Life Insurance Income Plan enrollment for an employee. The assigned Beneficiary or Beneficiaries are also available for review on this page as applicable.

Step	Action
1.	Navigate to the Life and AD/D Plan Enrollment page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enroll in Benefits > Life and AD/D Plan Enrollment Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

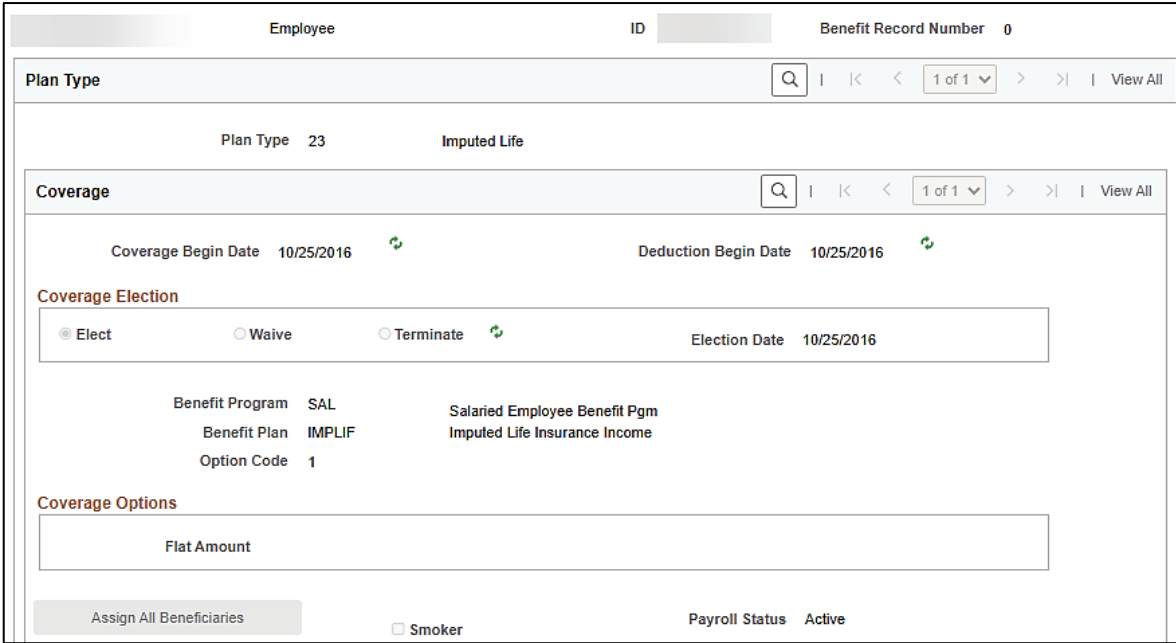


Benefits Job Aid

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Step	Action
	The Life and AD/D Benefits Find an Existing Value Search page displays. Life and AD/D Benefits 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 Benefit Record Number = Name begins with Last Name begins with Business Unit begins with Department Set ID begins with Department begins with Organizational Relationship = Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive 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 employee's Employee ID in the Empl ID field. Note: Users can also search by 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
4.	Click the Search button. Search Clear

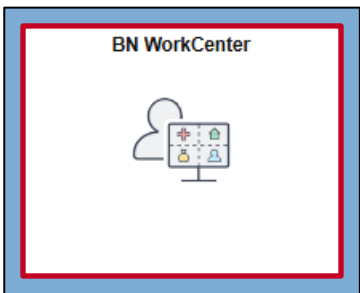
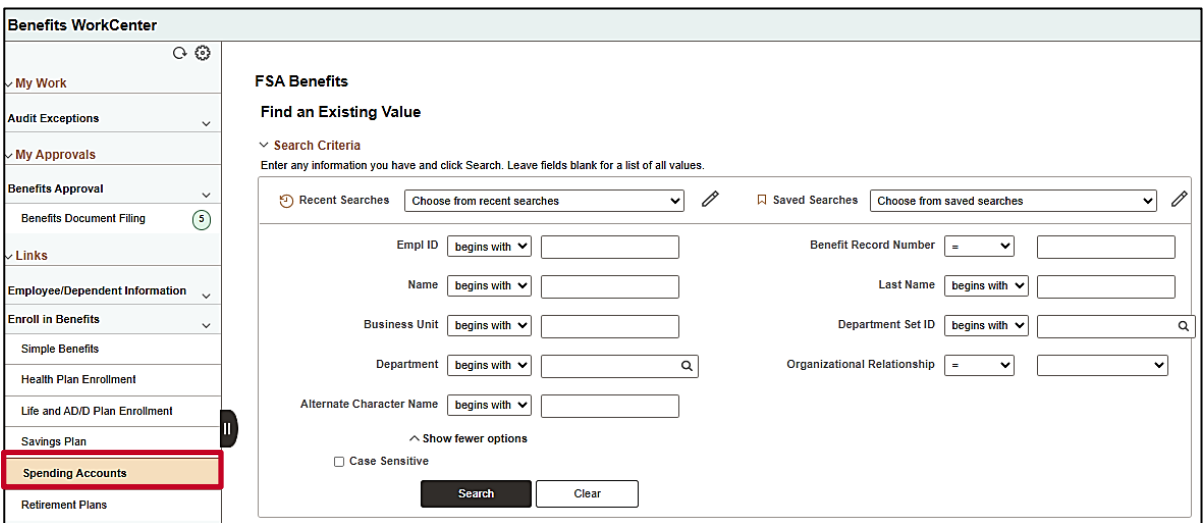


Step	Action
	The Life and AD/D Plan Enrollment page displays. 
5.	Review the information as needed.

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Reviewing the Spending Accounts Page

The **Spending Accounts** page is used to review the Flex Spending Medical and Flex Spending Dependent Care plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. Remember, employees must elect Flex Spending Accounts each Plan Year as desired.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Spending Accounts page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enroll in Benefits > Spending Accounts Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 



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Step	Action
	The FSA Benefits Find an Existing Value page displays. FSA Benefits 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 Benefit Record Number = Name begins with Last Name begins with Business Unit begins with Department Set ID begins with Department begins with Organizational Relationship = Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive Search Clear



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Step	Action
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The **Spending Accounts** page displays.

The screenshot displays the 'Spending Accounts' page for an employee. At the top, there are fields for 'Employee' (redacted), 'ID' (redacted), and 'Benefit Record Number' (0). Below this is a 'Plan Type' section with a search bar, navigation icons, and a 'View All' link. The 'Plan Type' is '60' and the 'Flex Spending Medical' plan is selected. The 'Coverage' section shows 'Coverage Begin Date' (07/01/2025), 'Coverage Election' (Elect), 'Deduction Begin Date' (06/25/2025), and 'Election Date' (05/22/2025). The 'Benefit Program' is 'Salaried Employee Benefit Pgm' and the 'Benefit Plan' is 'FLXMED Medical Flex Spending Account'. The 'Contribution Level' section shows 'Annual Pledge' (\$3300.00), 'Credit Rollover Included in Pledge' (\$0.00), and 'Employee Contribution Override' (Monthly). The 'Account Information' section shows 'FSA Account Status' (Active), 'Contributions YTD' (\$1787.50), and 'Employee Status' (Active). The 'Carryforward' section shows 'Carryover Amount' (0.00). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'.

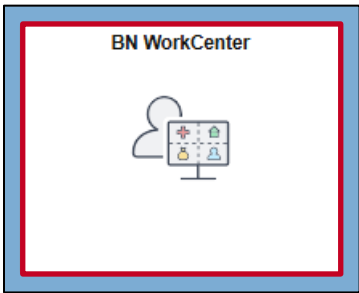
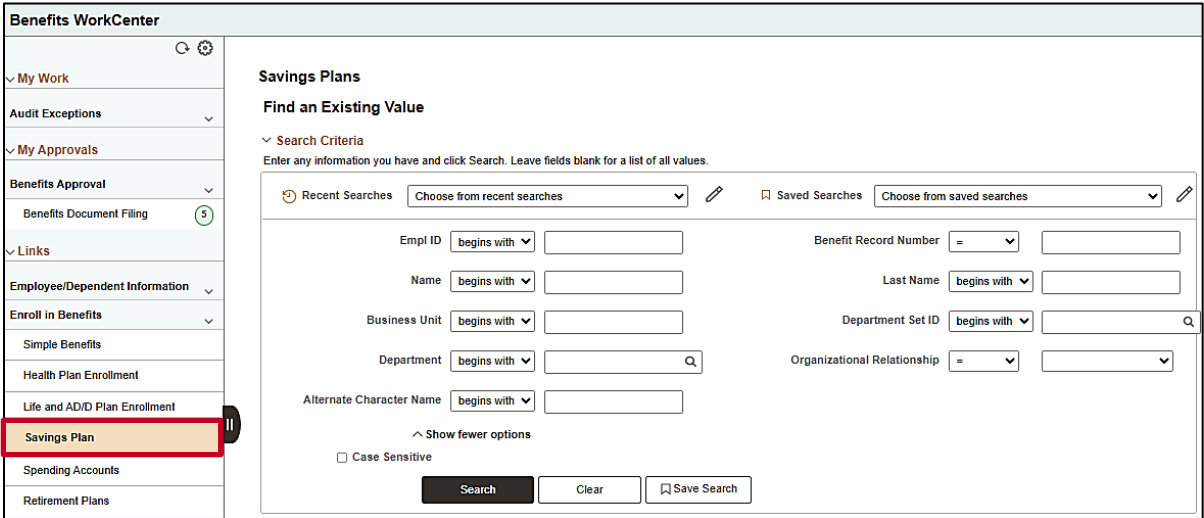
5. Click the **View All** link in order to see all of the enrollments and review the information as needed.

This screenshot is identical to the one above, but the 'View All' link in the 'Plan Type' section is highlighted with a red box to indicate the next step in the process.

Reviewing the Savings Plan Page

The **Savings Plan** page is used to review the Savings Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The assigned Beneficiary or Beneficiaries are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Savings Plan page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enroll in Benefits > Savings Plan Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

Step	Action
	The Savings Plans Find an Existing Value Search page displays. Savings Plans 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 ▼ Benefit Record Number = ▼ Name begins with ▼ Last Name begins with ▼ Business Unit begins with ▼ Department Set ID begins with ▼ Department begins with ▼ Organizational Relationship = ▼ Alternate Character Name begins with ▼ ^ Show fewer options ☐ Case Sensitive Search Clear Save 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.
3.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search by 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 ▼
4.	Click the Search button. Search Clear



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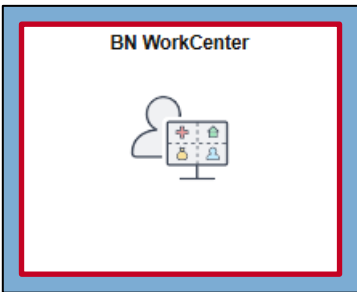
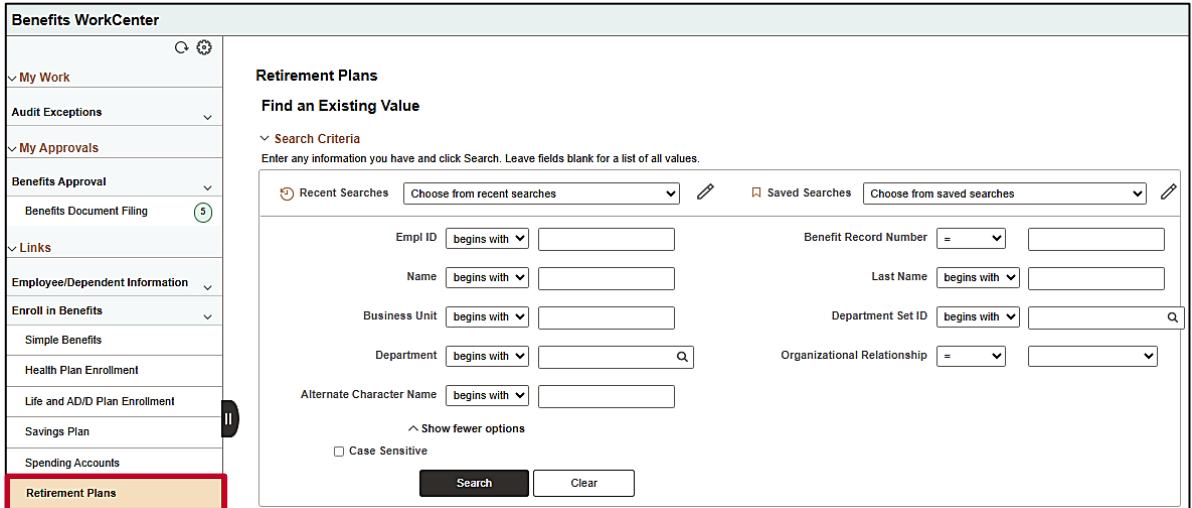
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Step	Action
	The Savings Plan page displays. Employee ID Benefit Record Number 0 ☐ Highly Compensated Plan Type Plan Type 46 403(b) Coverage Coverage Begin Date 10/01/2021 Deduction Begin Date 10/10/2021 Coverage Election ☐ Elect ☒ Waive ☐ Terminate Election Date 09/30/2021 Benefit Program SAL Salaried Employee Benefit Pgm Benefit Plan Option Code Before Tax Investment Flat Amount Percent of Earnings Annual Excess Credits Auto Enrollment Status Not Enabled Updated On Auto Escalation Status Not Enabled Updated On After Tax Investment Flat Amount Percent of Earnings Assign All Beneficiaries Payroll Status Active Dependent/Beneficiaries
5.	Click the View All link in order to see all of the enrollments and review the information as needed. Plan Type Plan Type 46 403(b) View All

Reviewing the Retirement Plans Page

The **Retirement Plans** page is used to review the Retirement Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Retirement Plans page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enroll in Benefits > Retirement Plans Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

Step	Action
	The Retirement Plans Find an Existing Value Search page displays. Retirement Plans 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 ▼ Benefit Record Number = ▼ Name begins with ▼ Last Name begins with ▼ Business Unit begins with ▼ Department Set ID begins with ▼ Q Department begins with ▼ Q Organizational Relationship = ▼ ▼ Alternate Character Name begins with ▼ ^ Show fewer options ☐ Case Sensitive Search Clear



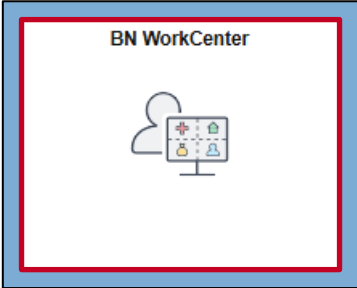
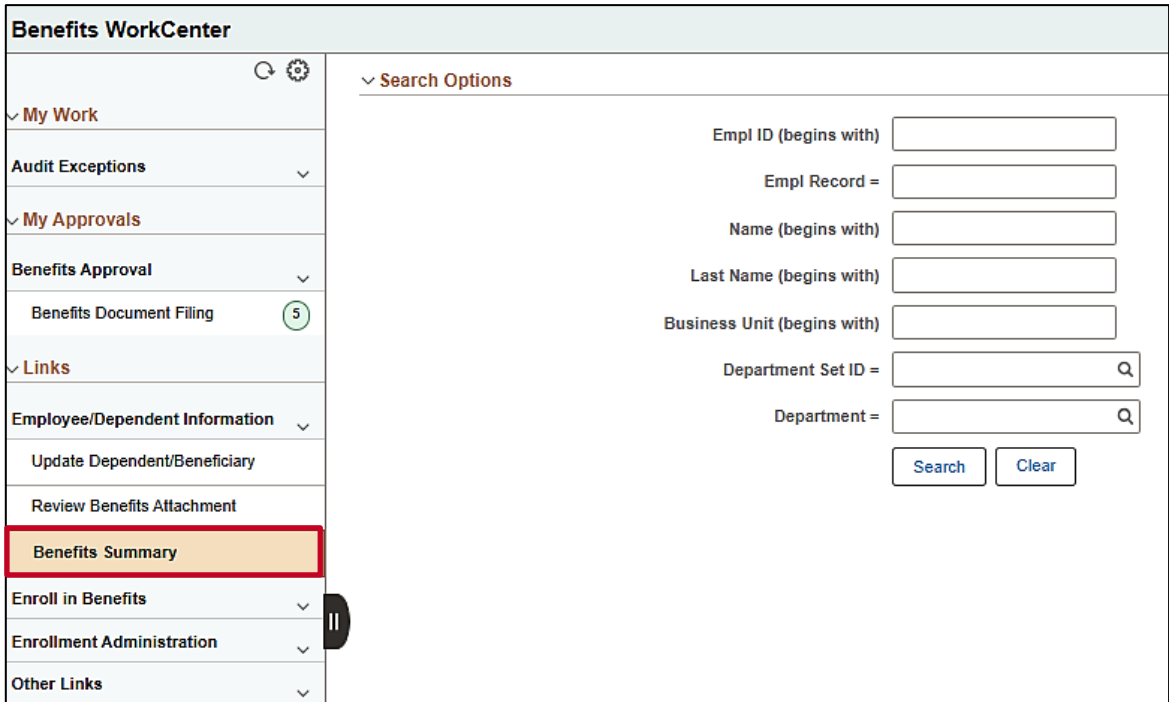
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Step	Action
	The Retirement Plans page displays. Employee ID Benefit Record Number 0 Plan Type Plan Type 70 Employee Retirement DB Coverage Deduction Begin Date 01/01/2022 Participation Election ☒ Elect ☐ Waive ☐ Terminate Benefit Program SAL Salaried Employee Benefit Pgm Benefit Plan HVRMDB VRS Hyb Mand. Defined Benefit Election Date 01/05/2022 Payroll Status Active Option Code 5 Save Return to Search Notify Refresh
5.	Click the View All link in order to see all of the enrollments and review the information as needed. Plan Type Plan Type 70 Employee Retirement DB View All

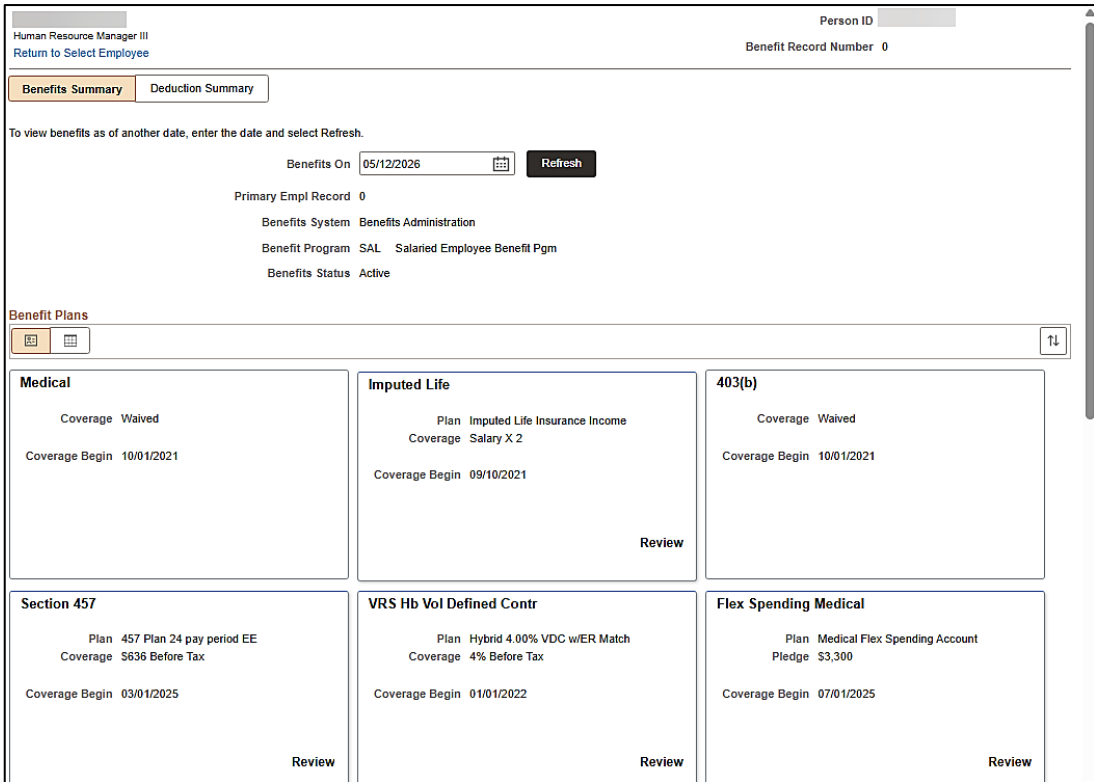
Reviewing the Benefits Summary Page

The **Benefits Summary** page is used to review all enrollments for an employee – current enrollments, historical enrollments, and future dated enrollments. This page can also be used to review the current deductions summary information for the employee.

Step	Action
1.	Navigate to the Benefits Summary page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Employee/Dependent Information > Benefits Summary Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 



Step	Action
	The Employee Benefits Summary Search page displays. Employee Benefits Summary ▼ Search Options Empl ID (begins with) Empl Record = Name (begins with) Last Name (begins with) Business Unit (begins with) Department Set ID = Q Department = Q 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 employee's Employee ID in the Empl ID field. Note: Users can also search by 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 ▼
4.	Click the Search button. Search Clear

Step	Action
	The Benefits Summary page displays. 
	Users can enter or select a date in the Benefits On field and click the Refresh button to review the employee benefits for a specific current, historical, or future date. 
7.	Review the information as needed.
8.	Click the Deduction Summary tab. 



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Step	Action
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The **Deduction Summary** page displays.

Human Resource Manager III
[Return to Select Employee](#)

Person ID
Benefit Record Number 0

Benefits Summary

Deduction Summary

Payroll System Payroll for North America
Pay Group SM1 Semimonthly Class (FRITHU07)
Payroll Status Active

Latest Deductions

Plan Type %	Benefit Plan %	Dedn Code %	Description %	Class %	Coverage Base %	Last Deduction %	Pay Period End %
23	IMPLIF	IMPLIF	Imp Life	Taxable Benefit	334000.00	28.40	01/09/2026
49	457P24	DEFCMP	Def Comp	Before-Tax		636.00	01/09/2026
				Nontaxable Btax Benefit		20.00	01/09/2026
4W	HVC400	HYBVDC	HYB VDC	Before-Tax		277.24	01/09/2026
				Nontaxable Btax Benefit		173.28	01/09/2026
60	FLXMED	FLXMED	Med FSA	Before-Tax		137.50	01/09/2026
70	HVRMDB	HVRMDB	HVRMDB	Before-Tax	6931.04	277.24	01/09/2026
				Nontaxable Benefit	6931.04	867.77	01/09/2026
7W	GTLR	GRPLFR	Grp Life	Nontaxable Benefit	6931.04	81.79	01/09/2026
7X	RTCDBR	BETHCB	Ret Hlth	Nontaxable Benefit	6931.04	77.63	01/09/2026

9. Review the information as needed.



The **Latest Deductions** section will only display if the Agency utilizes Cardinal payroll. For Agencies that do not use Cardinal Payroll, only the header information will be displayed.

Deduction Summary

Payroll System Payroll for North America
Pay Group MNP Non-Payroll
Payroll Status Active