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.

Table of Contents

Revision History 2
Reviewing the Health Plan Enrollment Page 3
Reviewing the Simple Benefits Page 6
Reviewing the Life and AD/D Plan Enrollment Page 9
Reviewing the Spending Accounts Page 12
Reviewing the Savings Plan Page 15
Reviewing the Retirement Plans Page 18
Reviewing the Benefits Summary Page 21

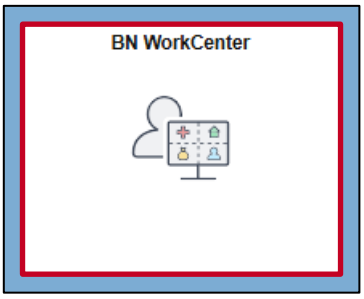
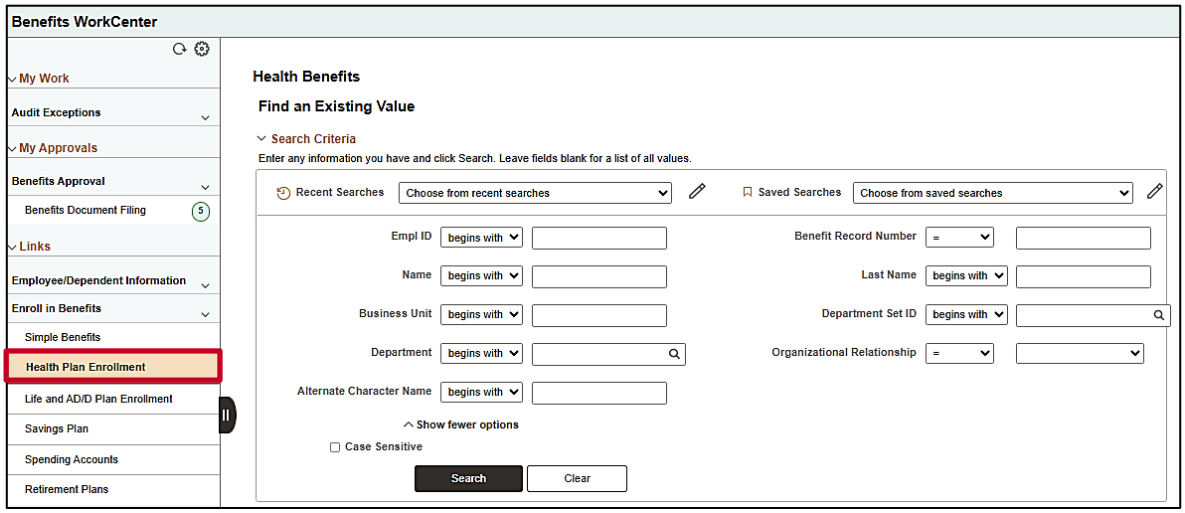
Revision History

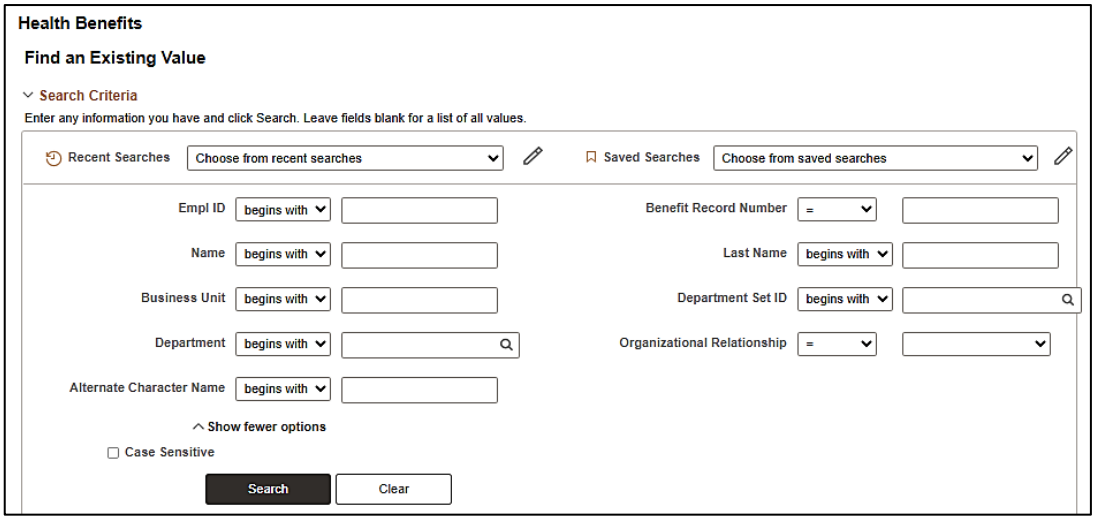
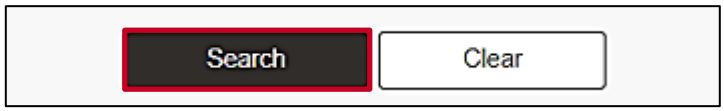
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/12/2026	Cross reference added to the **BN361 Linking Dependents to Retirees** Job Aid in Section 1, after Step 5.
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Step 1, Section 2, after 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

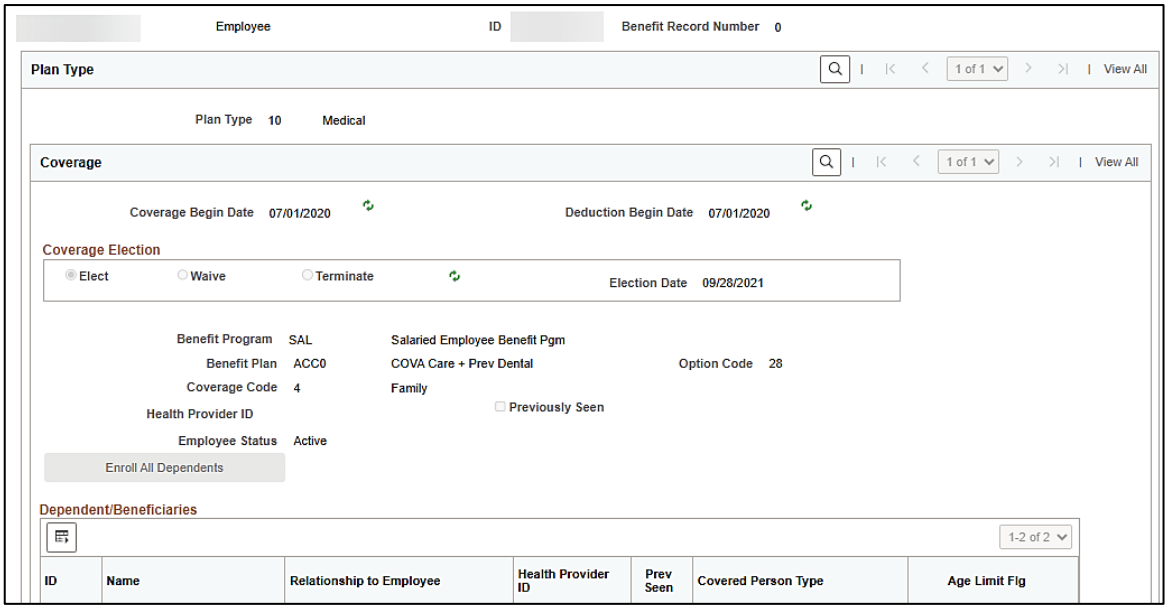
The **Health Plan Enrollment** page is used to review the health plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The enrolled dependents are also available for review on this page as applicable.

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. 

Step	Action
The **Health Plan Enrollment** page displays.	

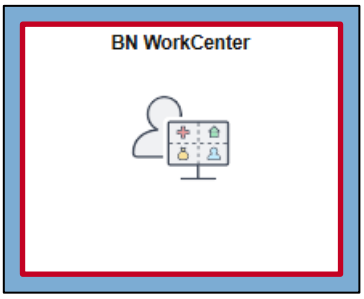
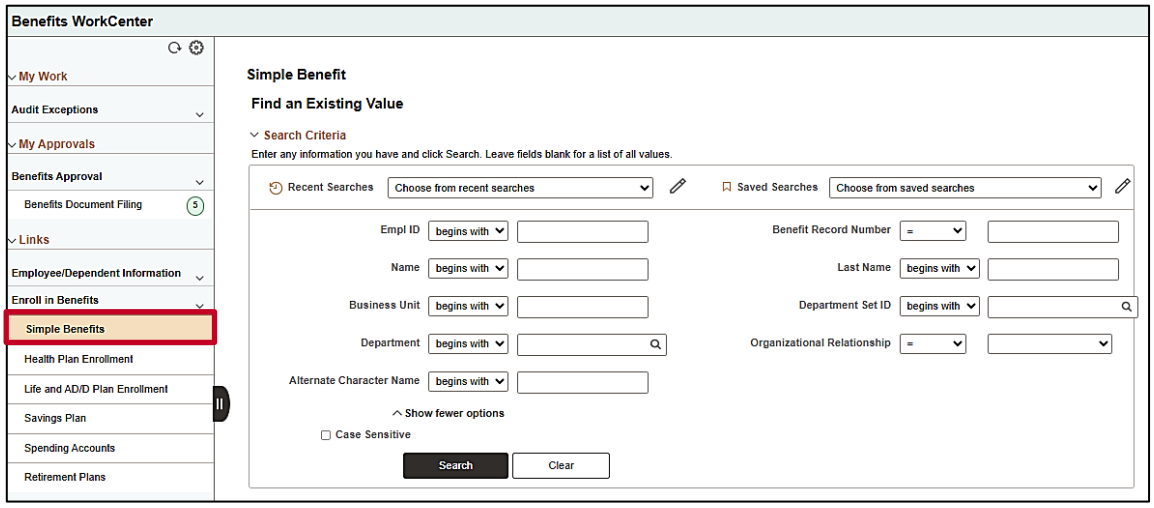


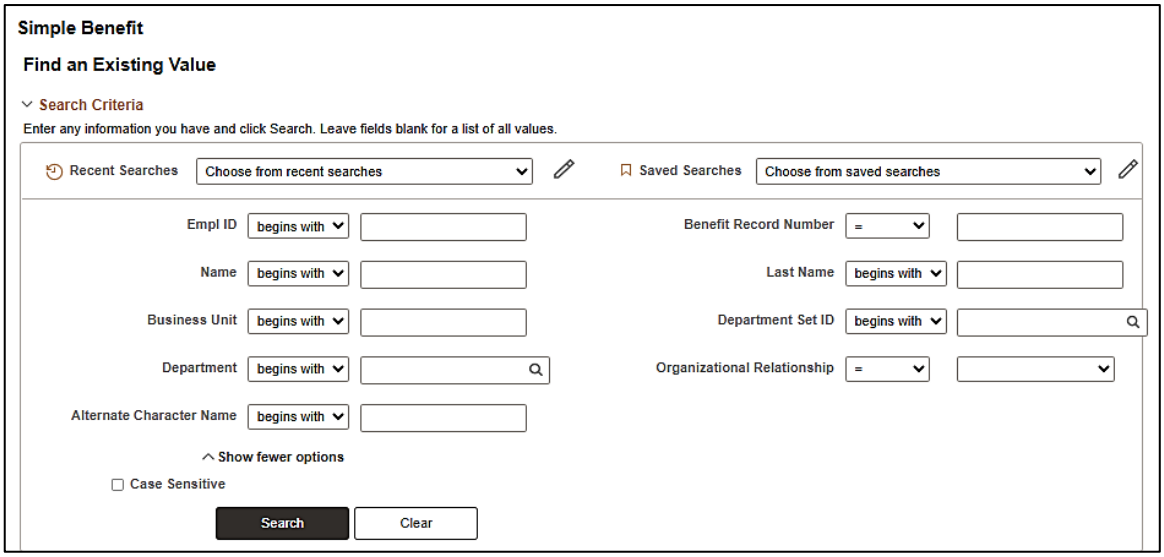
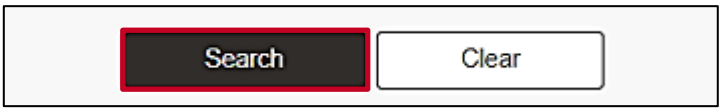
5.	Review the information as needed.
	If a red link appears on this page with the words “THIS PARTICIPANT HAS A LINKED RELATIONSHIP”, this means the employee is a Retiree with one or more Linked Dependent, or a Dependent linked to a Retiree. For more information, refer to the Job Aid titled **BN361 Linking Dependents and Retirees** on the Cardinal website in **Job Aids** under **Learning**.

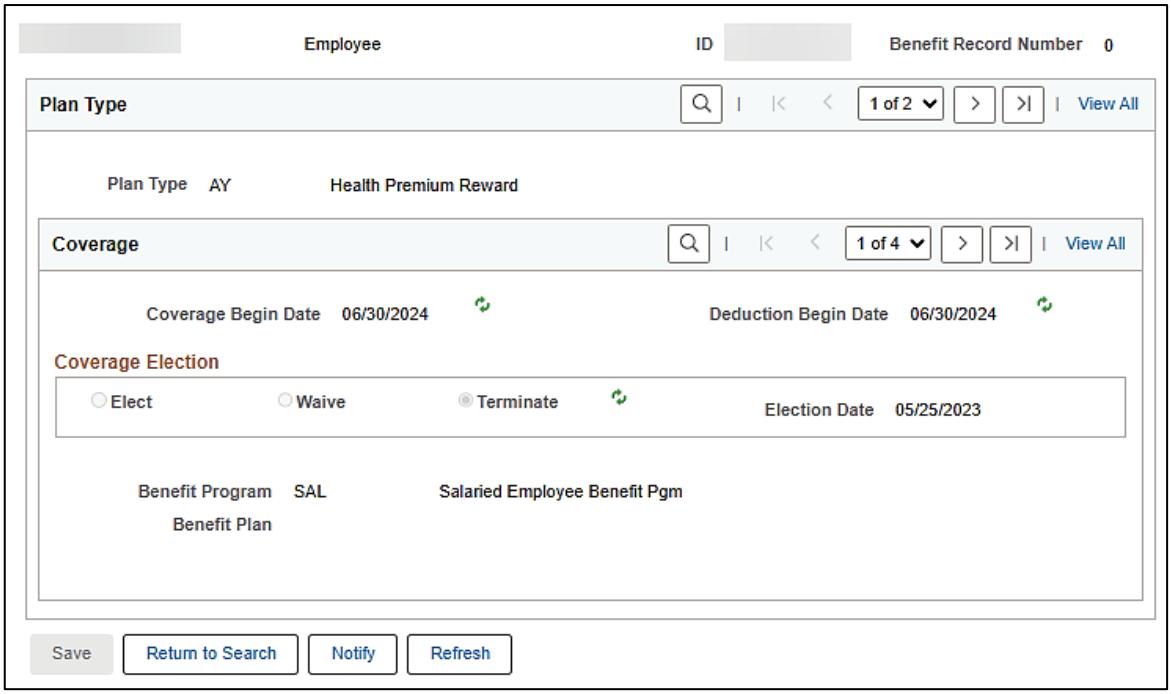
Reviewing the Simple Benefits Page

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.

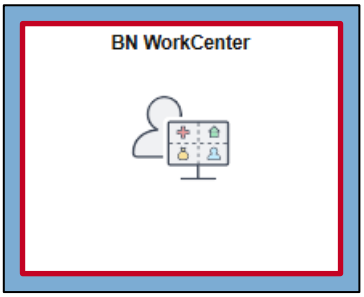
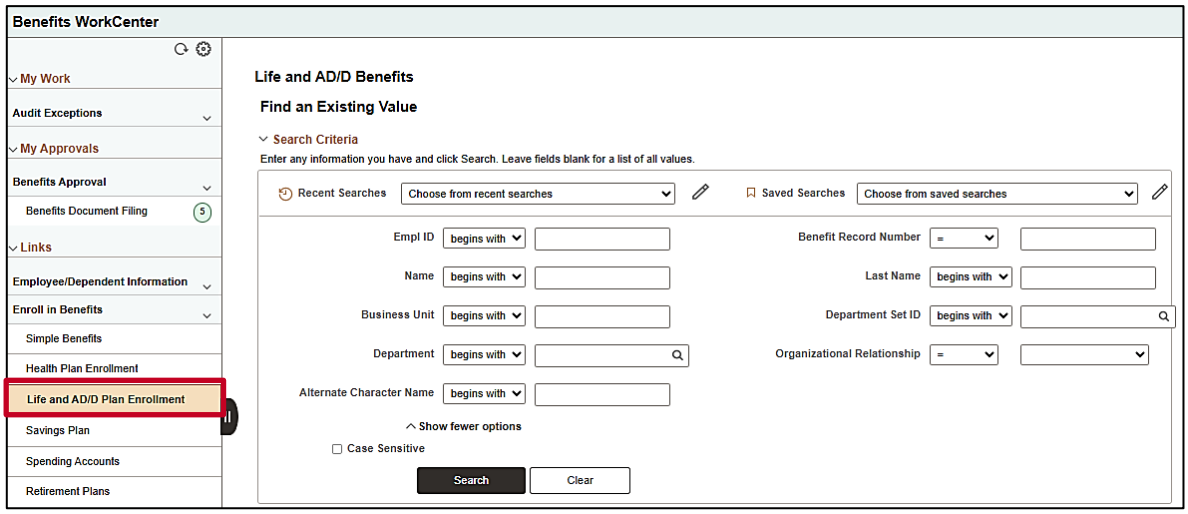
Step	Action
1.	Navigate to the **Simple Benefits** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following 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. 

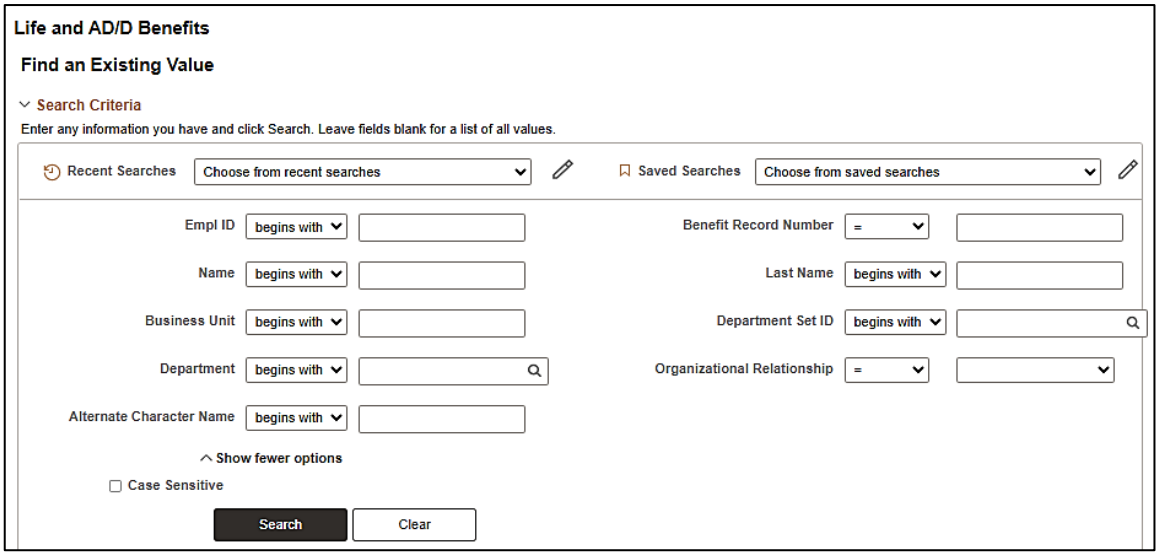
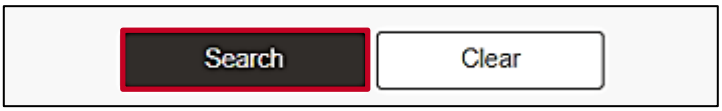
Step	Action
The **Simple Benefit Find an Existing Value Search** page displays. 	
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
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. 

Step	Action
The **Simple Benefits** page displays. 	
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed.

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. 

Step	Action
The **Life and AD/D 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. 

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

Employee ID Benefit Record Number 0

Plan Type 1 of 1 View All

Plan Type 23 Imputed Life

Coverage 1 of 1 View All

Coverage Begin Date 10/25/2016 Deduction Begin Date 10/25/2016

Coverage Election

Elect Waive Terminate Election Date 10/25/2016

Benefit Program SAL Salaried Employee Benefit Pgm
Benefit Plan IMPLIF Imputed Life Insurance Income
Option Code 1

Coverage Options

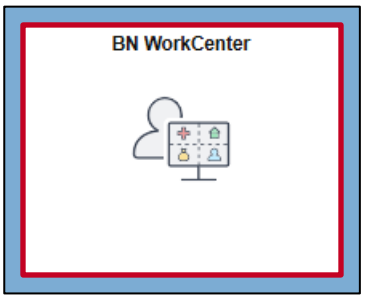
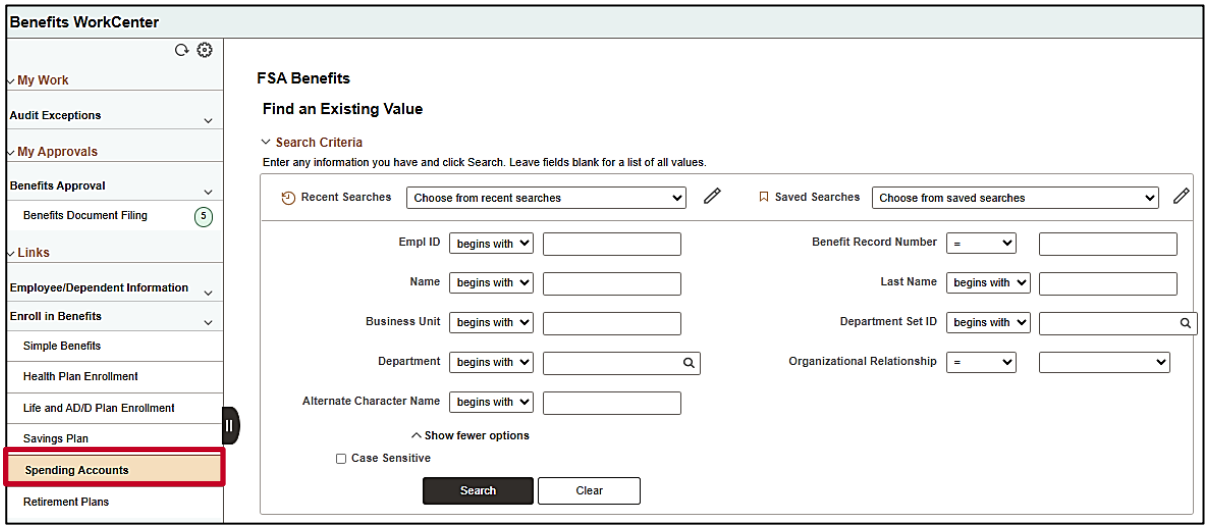
Flat Amount

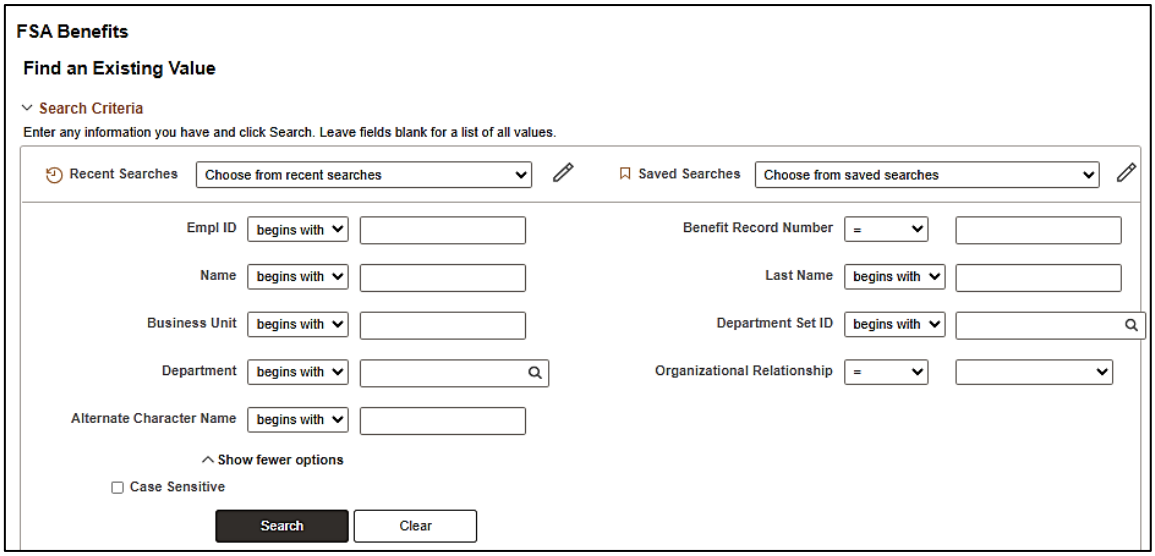
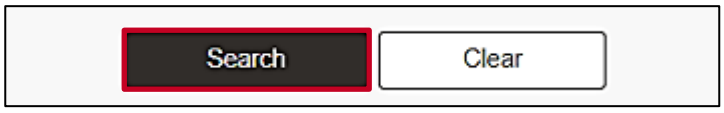
Assign All Beneficiaries Smoker Payroll Status Active

Reviewing the Spending Accounts Page

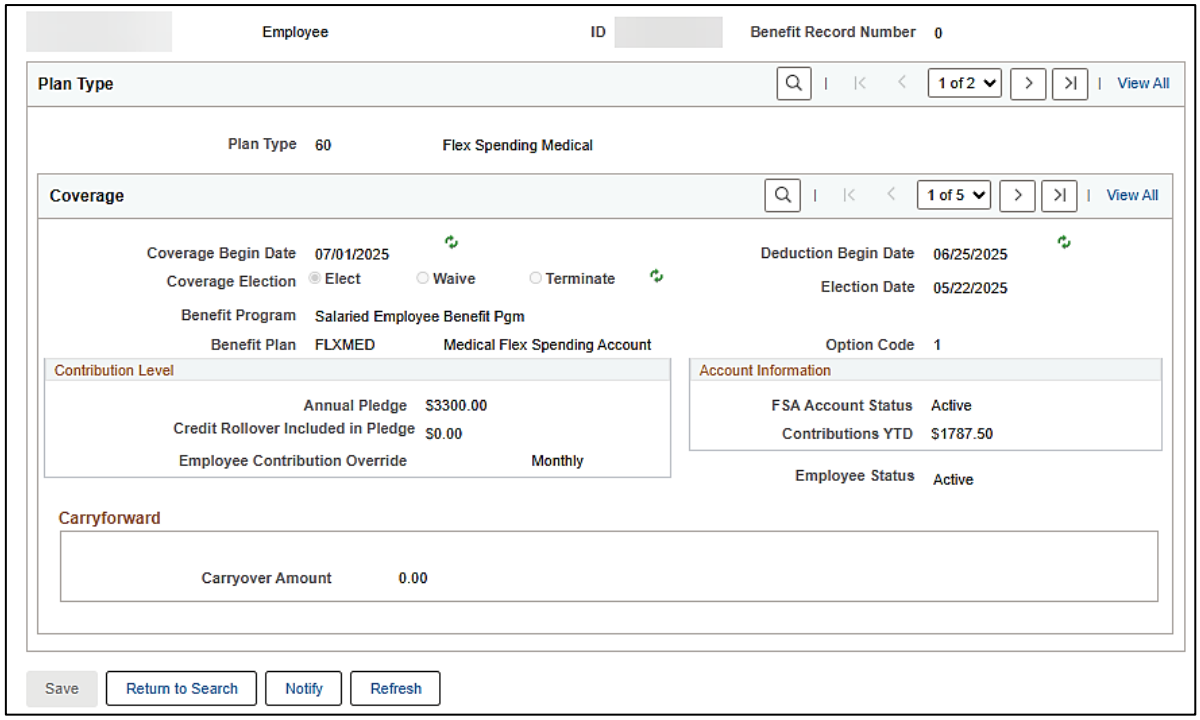
The **Spending Accounts** page is used to review the Flex Spending Medical and Flex Spending Dependent Care plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. Remember, employees must elect Flex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

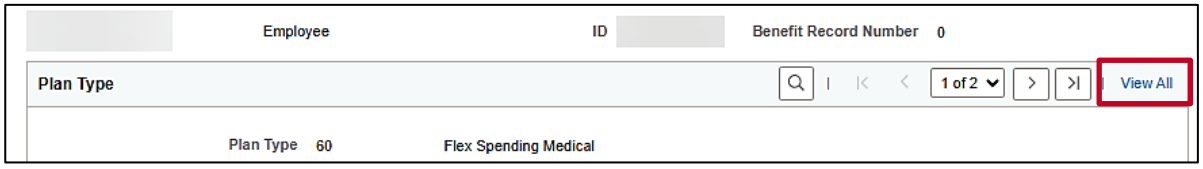
Step	Action
1.	Navigate to the **Spending Accounts** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following 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. 

Step	Action
The **FSA Benefits Find an Existing Value** 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. 

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



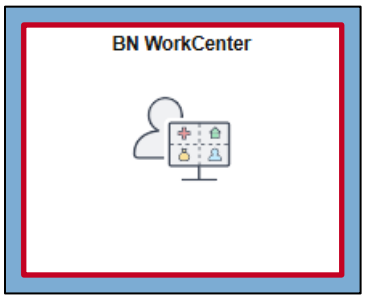
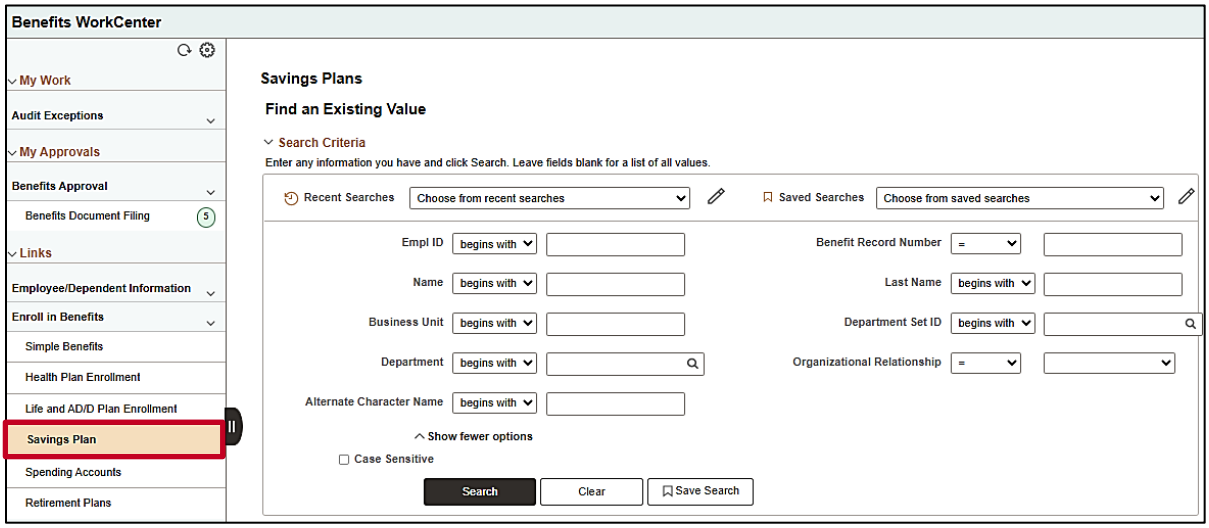
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed.

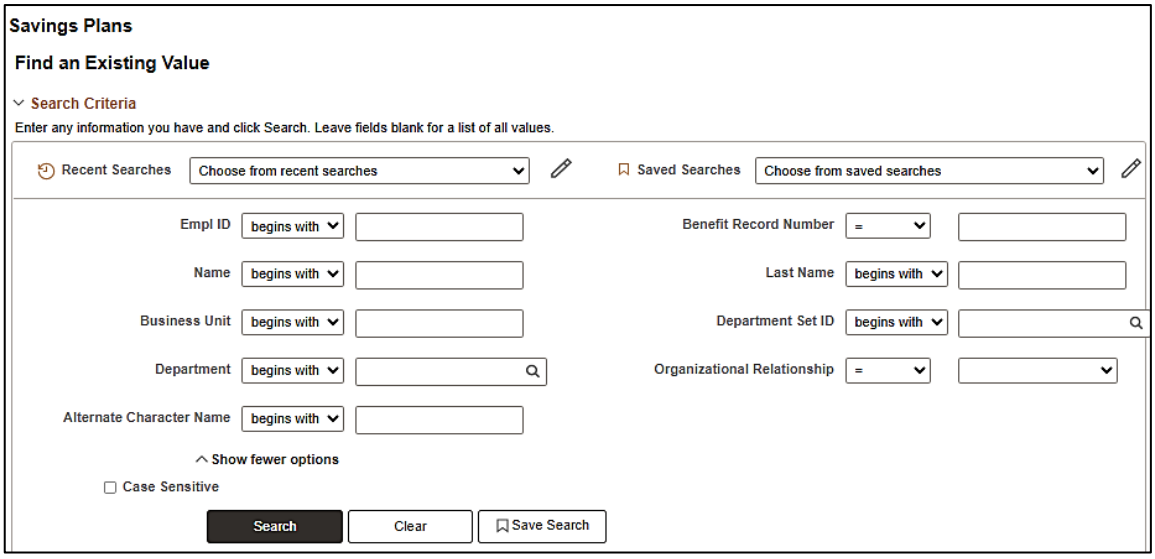
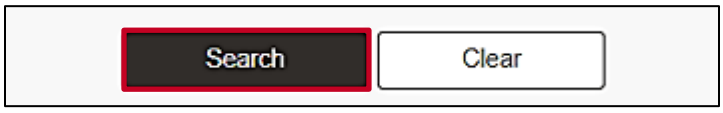


Reviewing the Savings Plan Page

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. 

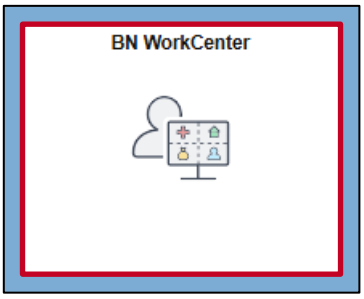
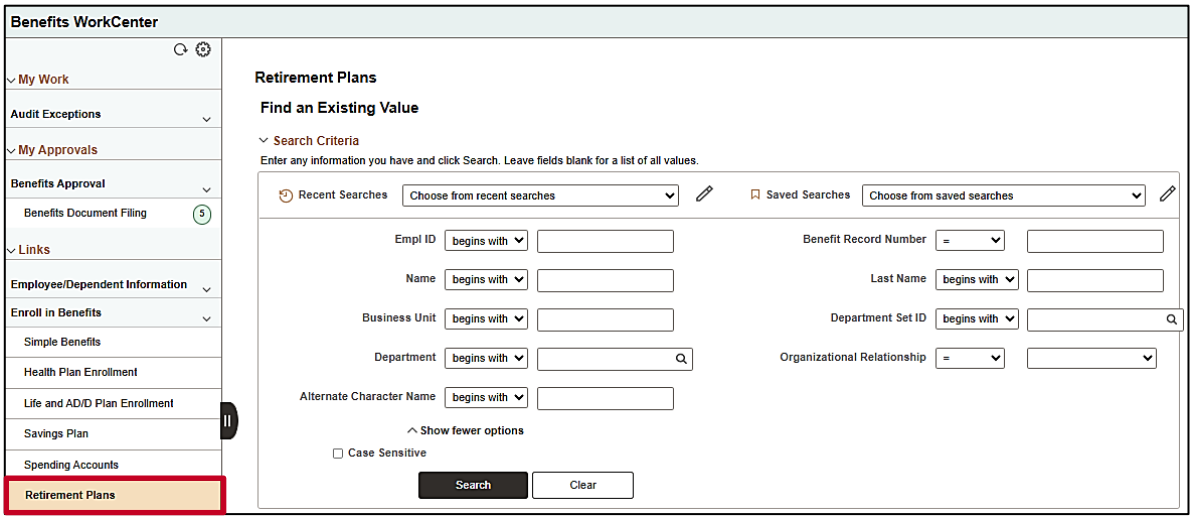
Step	Action
The **Savings Plans Find an Existing Value Search** page displays. 	
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
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. 

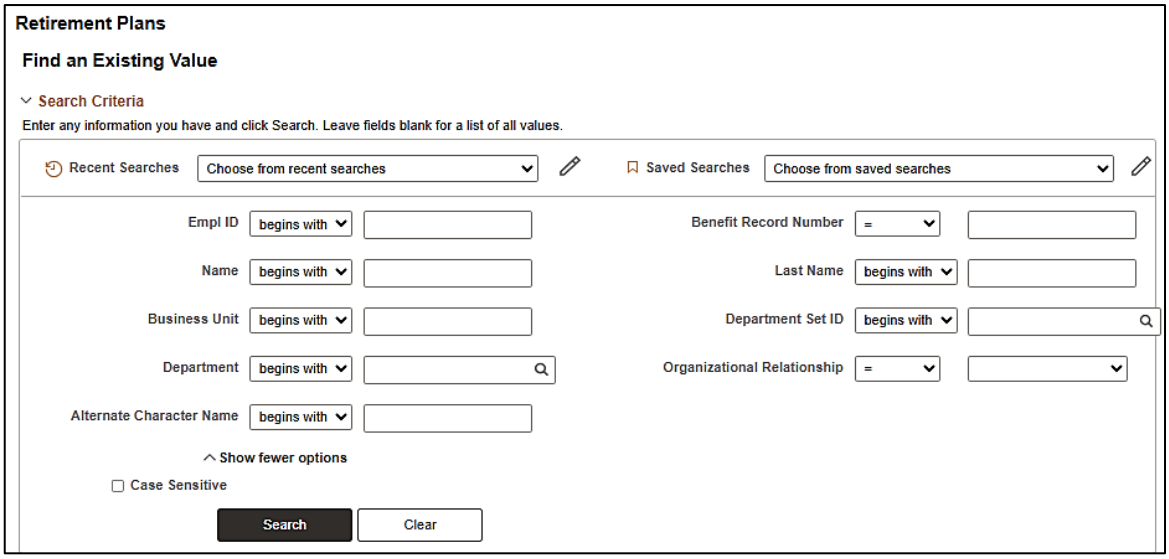
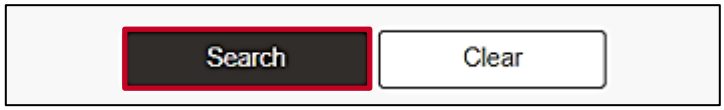
Step	Action
	The **Savings Plan** page displays.
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed.

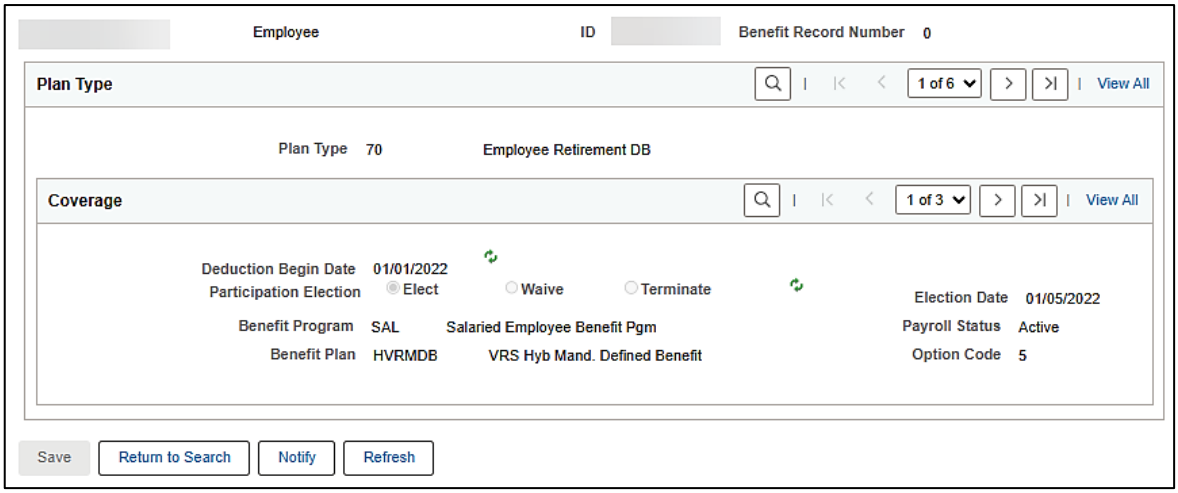
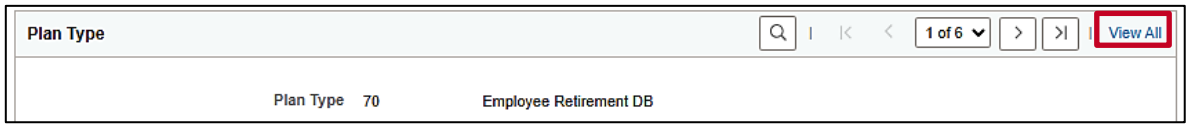
Reviewing the Retirement Plans Page

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.

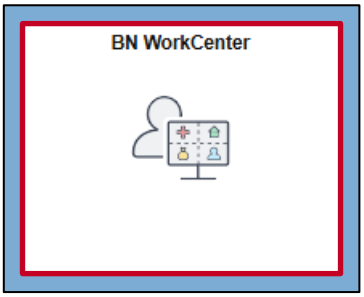
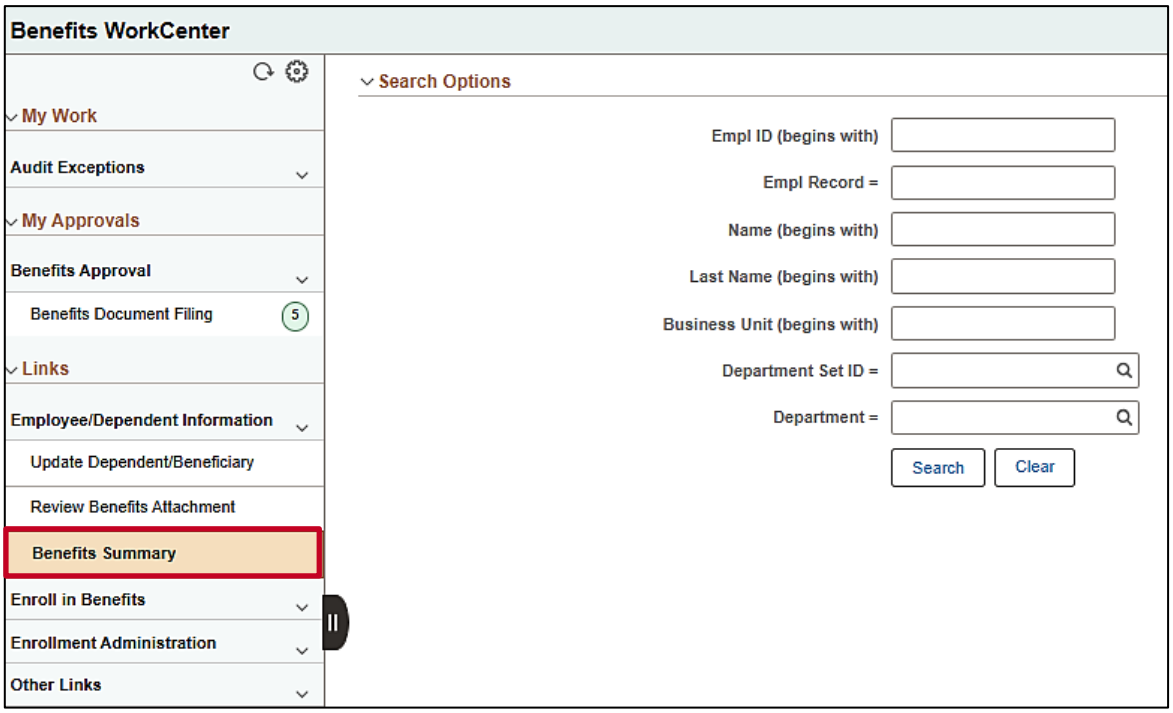
Step	Action
1.	Navigate to the **Retirement Plans** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following 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. 

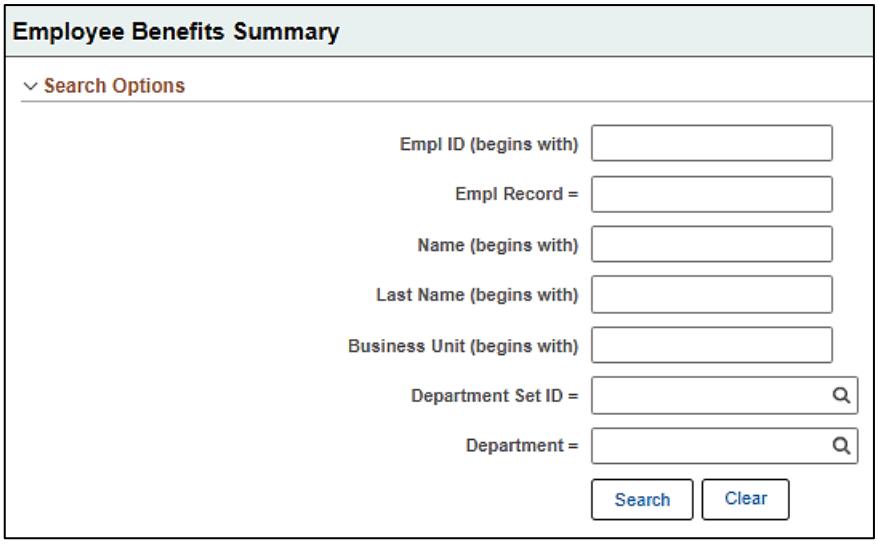
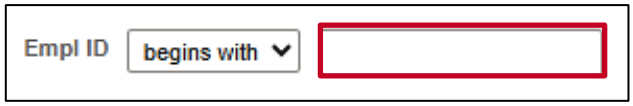
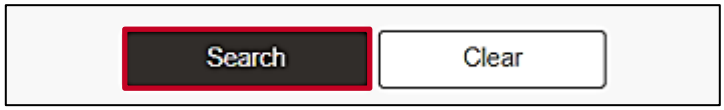
Step	Action
The **Retirement Plans Find an Existing Value Search** page displays. 	
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
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. 

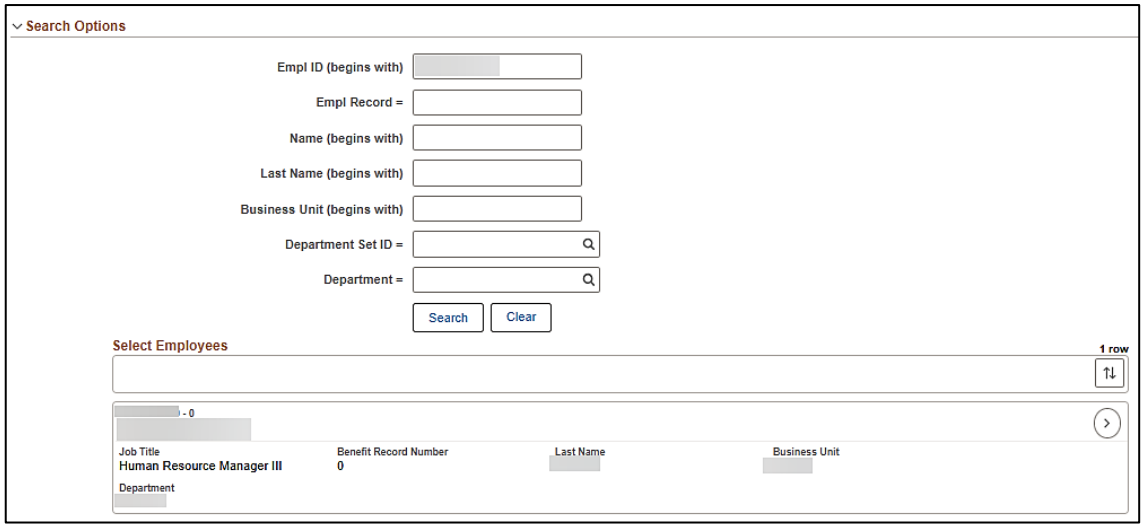
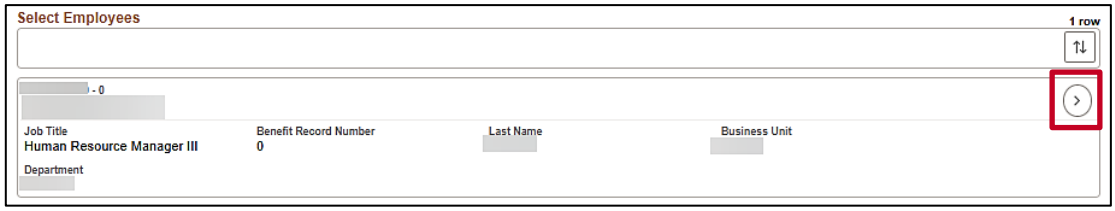
Step	Action
The **Retirement Plans** page displays. 	
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed. 

Reviewing the Benefits Summary Page

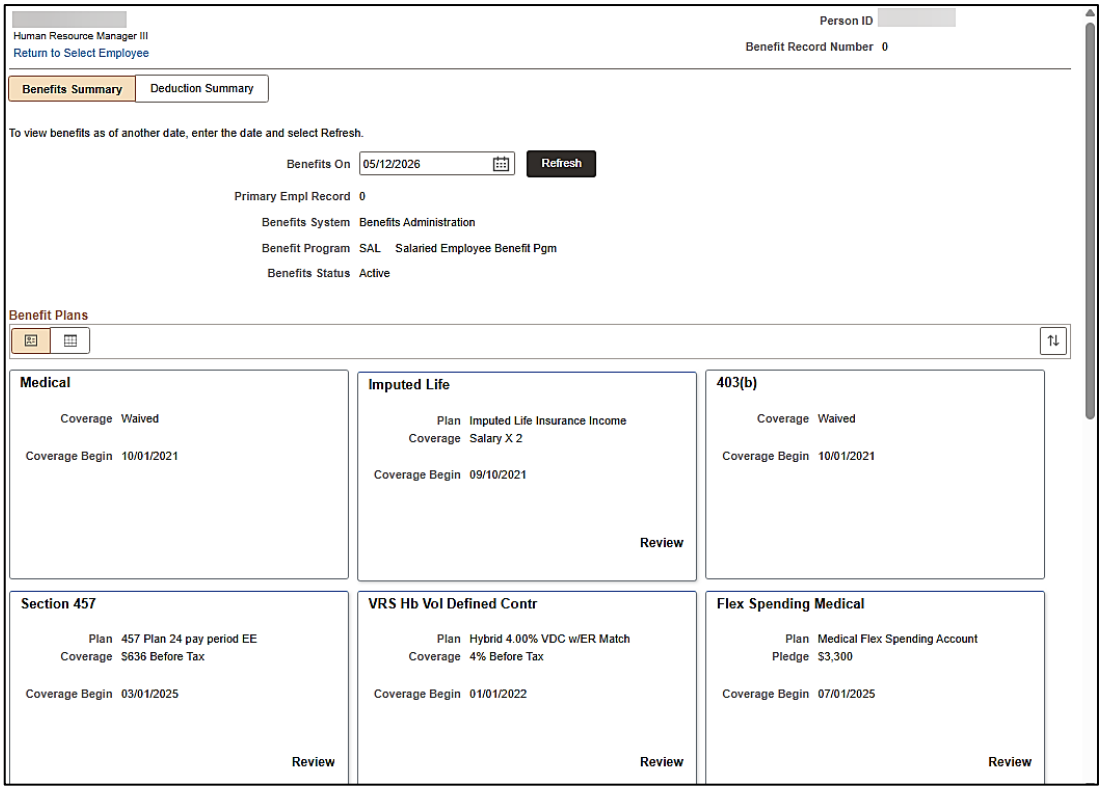
The **Benefits Summary** page is used to review all enrollments for an employee – current enrollments, historical enrollments, and future dated enrollments. This page can also be used to review the current deductions summary information for the employee.

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. 	
	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. 

Step	Action
The search results display. 	
5.	Click the **Select** button for the employee. 

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.

Step	Action

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	RTCRDR	RETHCR	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