



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

TLC and HBO Completing a New Hire and Benefit Enrollment Overview

This business process is applicable to both Health Benefits Only (HBO) Agencies and Localities in The Local Choice (TLC) Benefit Program.

This Job Aid provides a walkthrough of the steps required to complete a new hire and benefit enrollment for an employee and assumes the employee submits a benefit enrollment form to the BA with all the information necessary to complete the process.

All required information must be entered using the tabs on the page or the transaction cannot be saved.

Ensure the Job Aid is followed carefully as entering incorrect or missing information in Personal Data fields will cause significant impact to downstream benefits processes (e.g., Anthem, Aetna, and VRS).

When entering a new hire, the first step is to enter the person's Social Security Number (SSN) in the **Personal Details** section of the **Create Employee** page and initiate a search. This search is to prevent duplicate entries of the employee. If there is a match but only the employee's Personal Data is in Cardinal and not their Job Data, a new employment instance must be created to generate an employee record to use for the hire. Use the [Hiring a Person When Personal Data \(Employee ID\) Exists in Cardinal](#) section of this Job Aid to process the hire.

Note: If a person's Personal Data already exists in Cardinal, be sure they are not actually a Rehire. If so, see the Job Aid titled **TLC and HBO Completing a Rehire and Benefit Enrollment**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning** or on the [Locality Users](#) page.

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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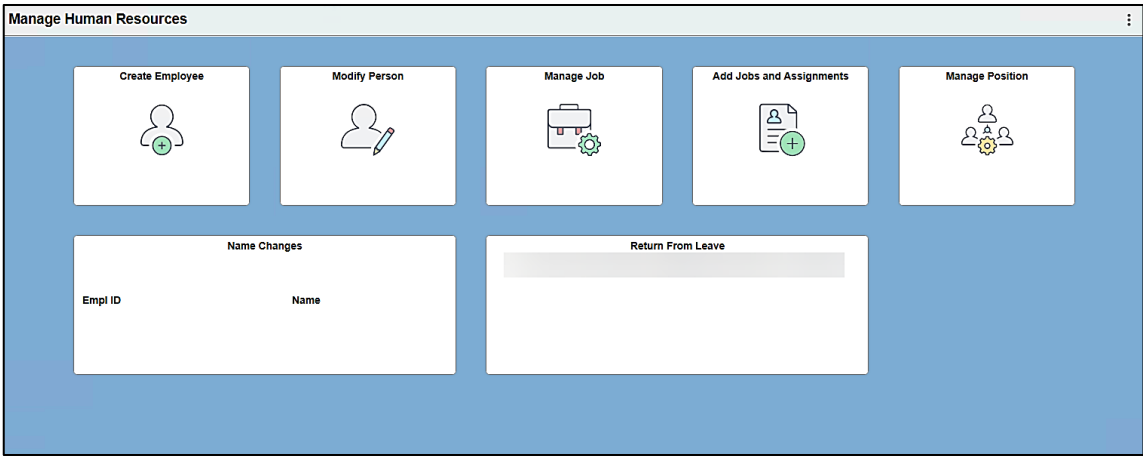
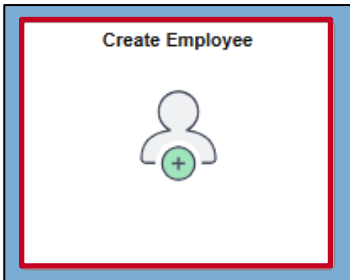
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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
4/14/2026	Baseline.

Completing a New Hire

Before beginning, the applicable employee's SSN must be available for immediate reference. This process begins with a search which is performed to validate that the new employee is not currently in the Cardinal system, or if the employee is already in the system, to obtain the existing Employee ID.

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



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Step	Action
	The Create Employee Search page displays. Create Employee Personal Details *National ID Date of Birth First Name Middle Name Last Name Search
3.	Enter the employee's SSN in the National ID field. *National ID
4.	Click the Search button. Search
	The Create Employee page displays with the Person Details tab (Step 1 of 3: Person Data) displayed by default. Create Employee 1 Person Data 2 Job Data 3 Summary Next > Person Details Contact Information Regional Checklist VA Person Info Validation Step 1 of 3: Person Data Person Details Name *Effective Date Format Type Proposed Name Prefix *First Name Middle Name *Last Name Name Suffix View Name Personal Information *Date of Birth Birth Country United States Birth Location Exclude Contact Information? ☐ Birth State Biographical Details If no data is entered, the default values will be saved upon selecting the Next button. Add Biographical Details



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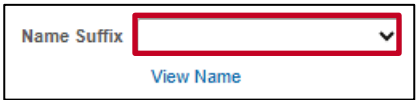
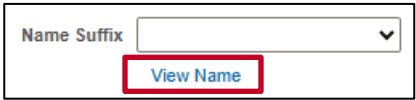
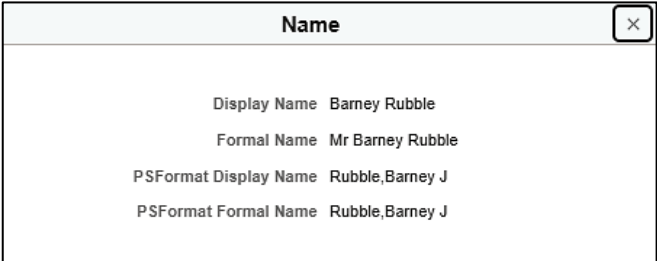
TLC and HBO Completing a New Hire and Benefit Enrollment

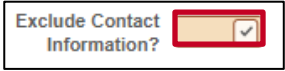
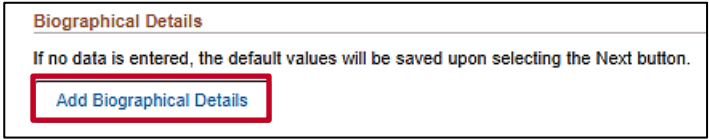
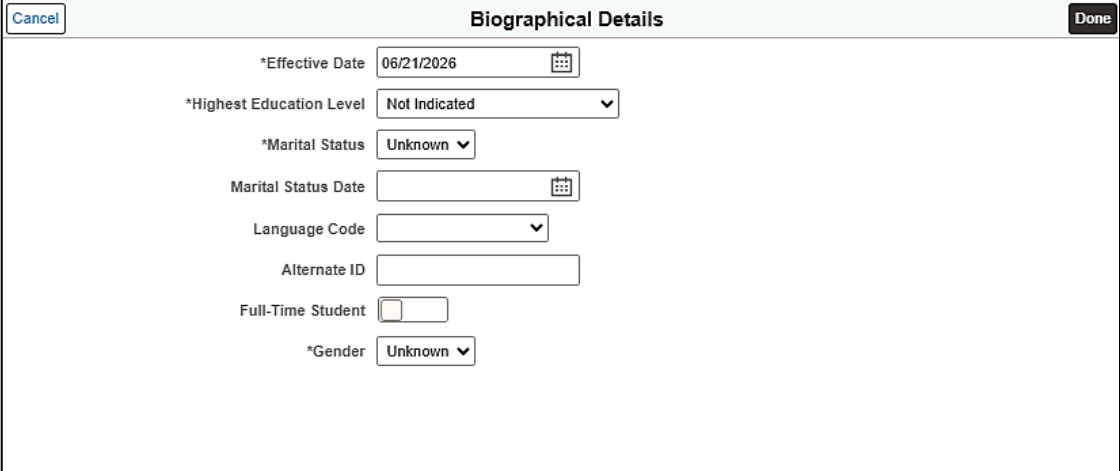
Step	Action																
	If the system displays a potential duplicate, the employee already exists in the Cardinal system. A bit of research, using the Organizational Relationship page, is needed to determine how to proceed. Users can click the Organizational Relationship link in the Potential duplicates section to review the employee's Job Data history and determine the type of transaction as applicable. If the person has never worked at the Commonwealth of Virginia, refer to the Hiring a Person When Personal Data (Employee ID) Exists in Cardinal section of this Job Aid. If the person has employment history, either a transfer or rehire should be completed as applicable. For further information on transferring existing employees, refer to the Job Aid titled HR351 Managing an Inter-Agency Transfer, located on the Cardinal website in Job Aids under Learning. For further information on rehiring employees, refer to the Job Aid titled TLC and HBO Completing a Rehire and Benefit Enrollment, located on the Cardinal website in Job Aids under Learning or on the Locality Users page. Create Employee Personal Details *National ID Date of Birth First Name Middle Name Last Name Search  Potential duplicates found. Modify the duplicate person or create a new Employee record. Create Employee Potential duplicates <table><tr><th>Person ID</th><th>Date of Birth</th><th>National ID Country</th><th>National ID Type</th><th>National ID</th><th>First Name</th><th>Last Name</th><th></th></tr><tr><td></td><td>02/11/1979</td><td>United States</td><td>Social Security Number</td><td></td><td>Apple</td><td>Pie</td><td> Organizational Relationship  </td></tr></table>	Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name			02/11/1979	United States	Social Security Number		Apple	Pie	Organizational Relationship 
Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name											
	02/11/1979	United States	Social Security Number		Apple	Pie	Organizational Relationship 										
5.	The Effective Date field defaults to today's date. Update this date to the applicable date of the new hire as needed. *Effective Date 06/21/2026 																
	The Effective Date cannot be greater than today's date when adding or modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.																
6.	Optionally, click the Name Prefix dropdown button and select the applicable prefix. Name Prefix 																



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Step	Action
7.	Enter the employee's first name in the First Name field (required). 
8.	Optionally, enter the employee's middle name or middle initial in the Middle Name field. 
	Do not add a period behind the middle initial.
9.	Enter the employee's last name in the Last Name field (required). 
	Do not include suffixes (Jr, Sr, or IV) in the Last Name field.
10.	Click the Name Suffix dropdown button and select the applicable suffix as needed. 
11.	Optionally, click the View Name link to view the how the name will be displayed. 
The Name page displays in a pop-up window. Note: After reviewing, users can click the "X" button to close the pop-up window and adjust the name fields if needed. 	

Step	Action
12.	Scroll down to the Personal Information section and click the Date of Birth Calendar icon to select the employee's date of birth (required). Note: The Birth Country field defaults to "USA". This can be updated but is not required as this data is not reported. 
13.	Click the Exclude Contact Information field toggle if the employee's personal information should not be sent to VITA to be included in the Active Directory Extract or COV Employee Directory Extract (e.g., Undercover Officers). 
14.	Click the Add Biographical Details button. 
The Biographical Details page displays in a pop-up window. 	
	The Effective Date field within this section defaults to the effective date selected above. Do not change.



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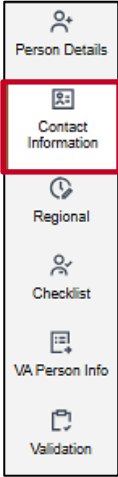
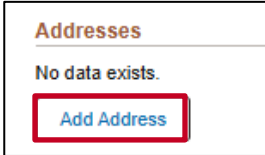
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Step	Action								
15.	Click the Highest Education Level dropdown button and select the employee's highest level of education. *Highest Education Level Not Indicated								
16.	Click the Marital Status dropdown button and select the employee's legal marital status. *Marital Status Unknown								
i	When a selection is made in the Marital Status field, the Marital Status Date updates to the Effective Date above. Do not change. *Marital Status Married Marital Status Date 06/21/2026								
i	The Language Code, Alternate ID, and Full-Time Student fields are not currently tracked or used in Cardinal.								
17.	Click the Gender dropdown button and select the employee's gender. This field is a required field for benefits and payroll purposes and must provide the employee's legal gender. This is not to be confused with the optional Preferred Gender field located on the VA Person Info section. *Gender Unknown								
i	The Gender field defaults to "Unknown". If it is not updated prior to payroll processing, the employee's payroll will error out. Update the Gender field as soon as the information is obtained.								
18.	Click the Done button. Done								
i	The National ID section auto-populates. National ID + <table><thead><tr><th>*Country ↑↓</th><th>*National ID Type ↑↓</th><th>National ID ↑↓</th><th>Primary ID ↑↓</th></tr></thead><tbody><tr><td>USA</td><td>Social Security Number</td><td>987-66-5544</td><td>Yes</td></tr></tbody></table>	*Country ↑↓	*National ID Type ↑↓	National ID ↑↓	Primary ID ↑↓	USA	Social Security Number	987-66-5544	Yes
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USA	Social Security Number	987-66-5544	Yes						



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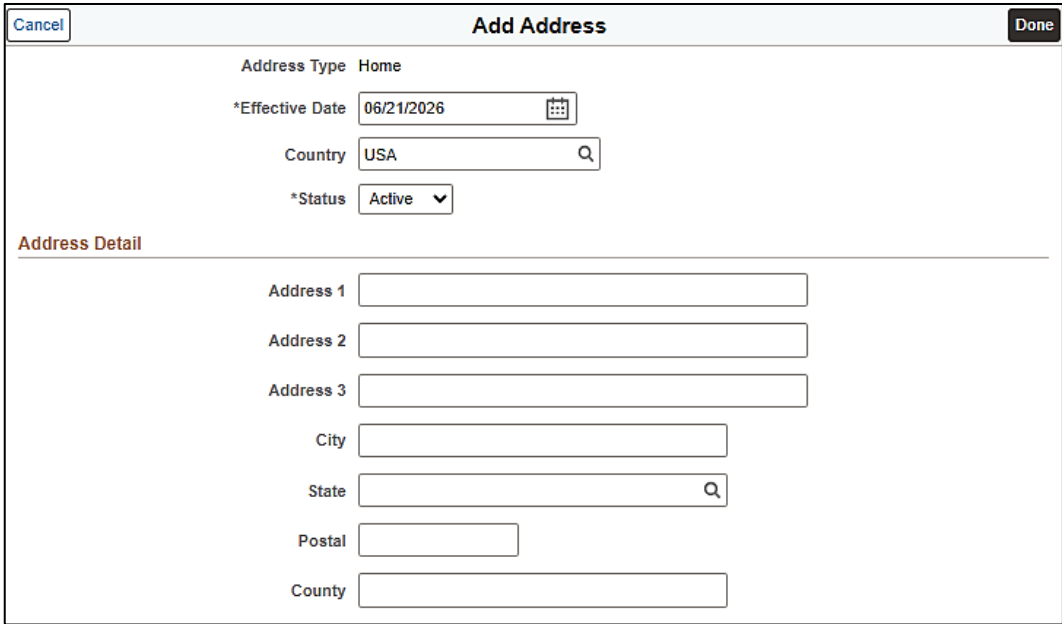
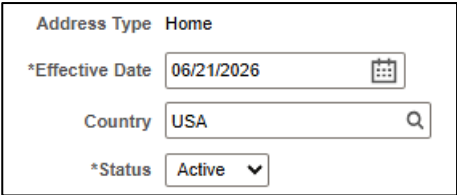
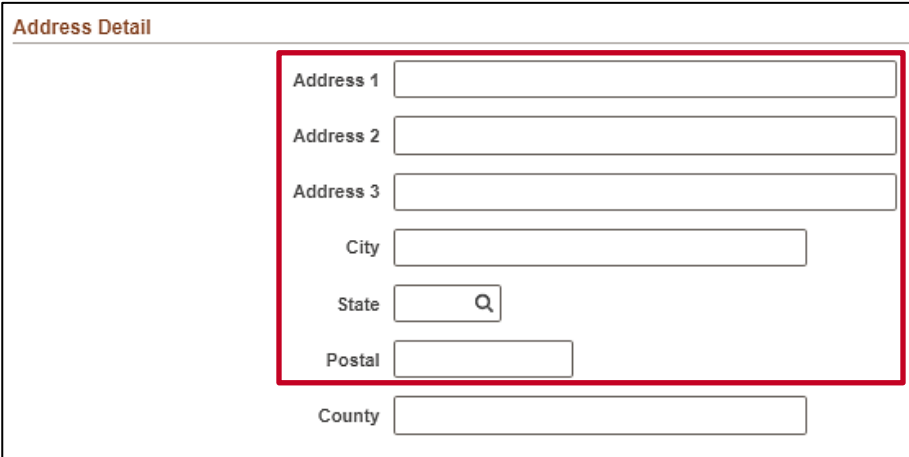
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Step	Action
19.	Click the Contact Information tab or use the scroll bar to scroll to the Contact Information section. 
The Contact Information section displays. 	
20.	Click the Add Address button in the Addresses section. 



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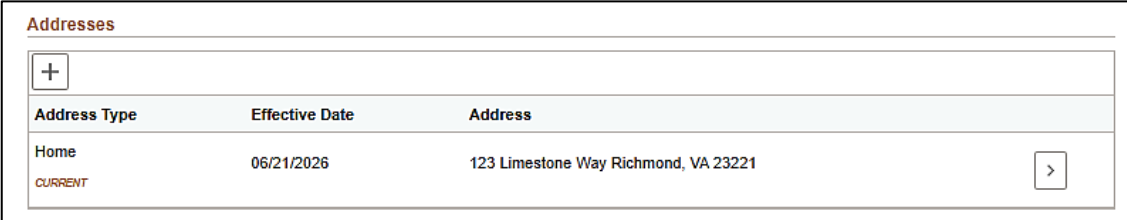
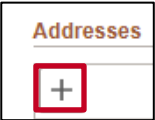
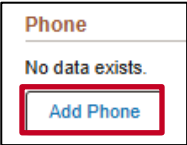
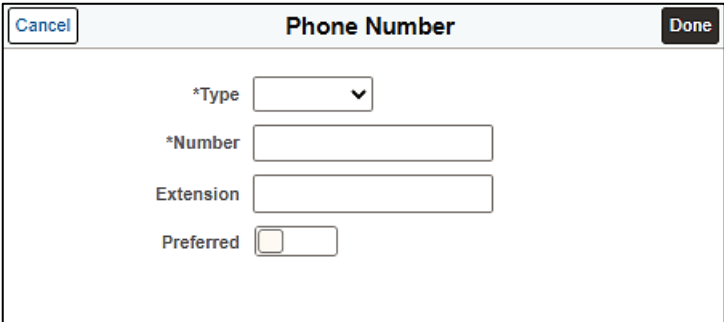
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Step	Action
	The Add Address page displays in a pop-up window. 
	The top section of the Add Address page auto-populates. Do not change. 
21.	Enter the employee's address information using the applicable fields in the Address Detail section. 



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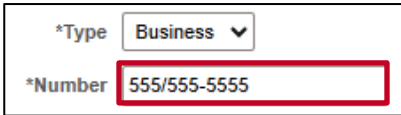
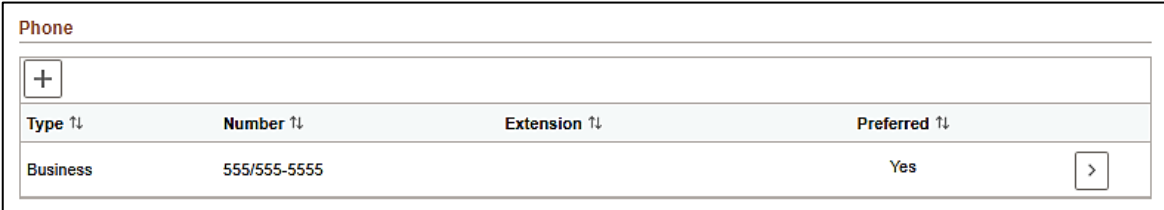
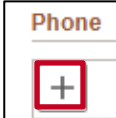
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Step	Action
	The Address 1 , City , State , and Postal are required fields. The employee's personal data cannot be saved if any of these fields are blank.
22.	Click the Done button once the applicable Address Detail information has been entered. 
The Addresses section redisplay. 	
	An Address Type of "Home" is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information. Additional addresses can be added by clicking the Add button (+) if needed and repeating Steps 21-22. 
23.	Click the Add Phone button in the Phone section. 
The Phone Number page displays in a pop-up window. 	



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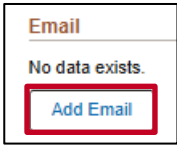
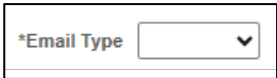
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Step	Action
24.	Click the Type dropdown button and select the type of phone number being entered. 
25.	Enter the employee's phone number in the Number field. 
	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.
26.	Select the Preferred field toggle to identify the employee's preferred phone number. 
27.	Click the Done button once the Phone Number information has been entered. 
The Phone section redisplay.	
	
	Additional phone numbers can be added for the employee as needed by clicking the Add button (+) and then repeating Steps 24-27 . 



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Step	Action
28.	Click the Add Email button in the Email section. 
	The Email Address page displays in a pop-up window. 
29.	Click the Email Type dropdown button and select the type of email address being entered. 



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Step	Action
30.	Complete the Email Address page using the following guidelines: - If the employee has been issued a business email: - Click the Email Type dropdown button and select “Business” - Enter the email address in the Email Address field - Notify the employee of their email address and provide information to register for Cardinal Employee Self Service using this email Note: When “Business” is selected, the Preferred field defaults to “Yes”.  - If the employee’s business email has been requested, but not yet assigned or the employee chooses not to provide a personal email: - Click Email Type dropdown button and select “Business” - Enter “noemail@virginia.gov” in the Email Address field Note: When no email address is available, “noemail@virginia.gov” must be used. - If a business email will not be provided to the employee: - Click the Email Type dropdown button and select “Personal” Enter the email address in the Email Address field
31.	Click the Done button. 

The **Email** section redispays.



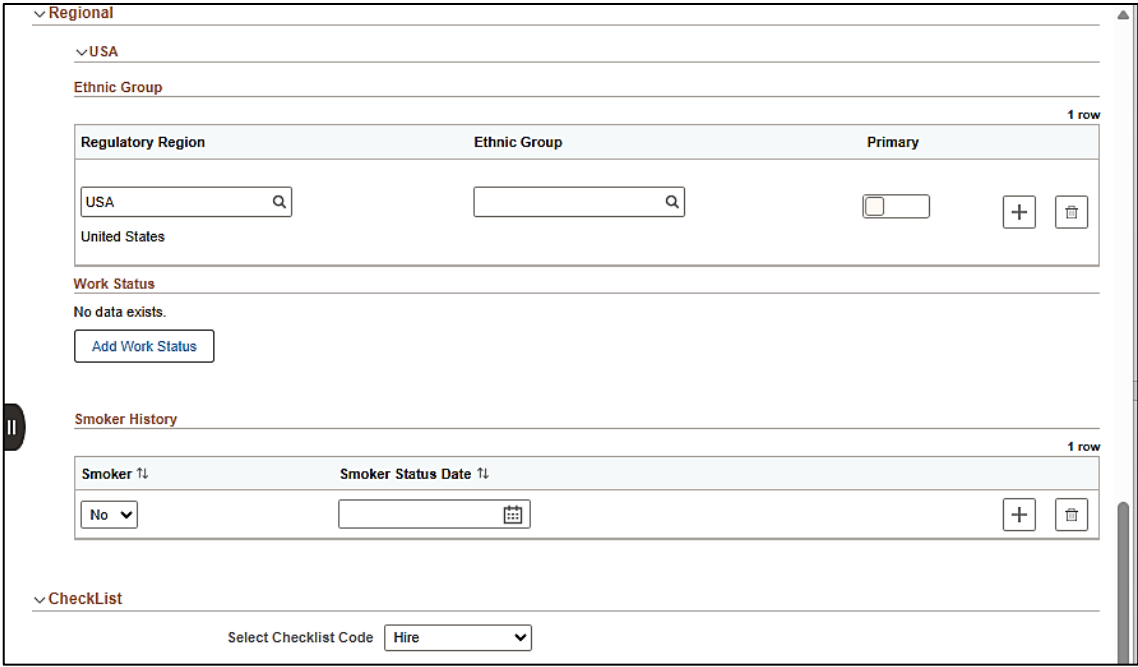
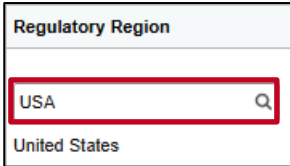
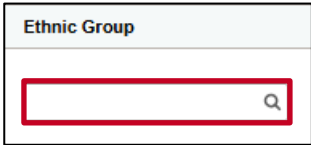
The screenshot shows the 'Email' section of a form. It has a title 'Email' and a sub-header 'Email Option Selection'. There are three radio button options: 'Agency Provided Email' (selected), 'Pending Agency Provided Email', and 'Employee Provided Email'. Below these are two numbered instructions: '1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except:' and '2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov'. There is a plus sign icon in a box. Below that is a table with three columns: 'Type', 'Email Address', and 'Preferred'. The table has one row with 'Business' in the Type column, 'Barney.Rubble@DOLI.VA.GOV' in the Email Address column, and 'Yes' in the Preferred column. There is a right arrow icon in a box at the bottom right of the table.

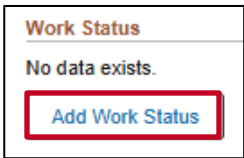
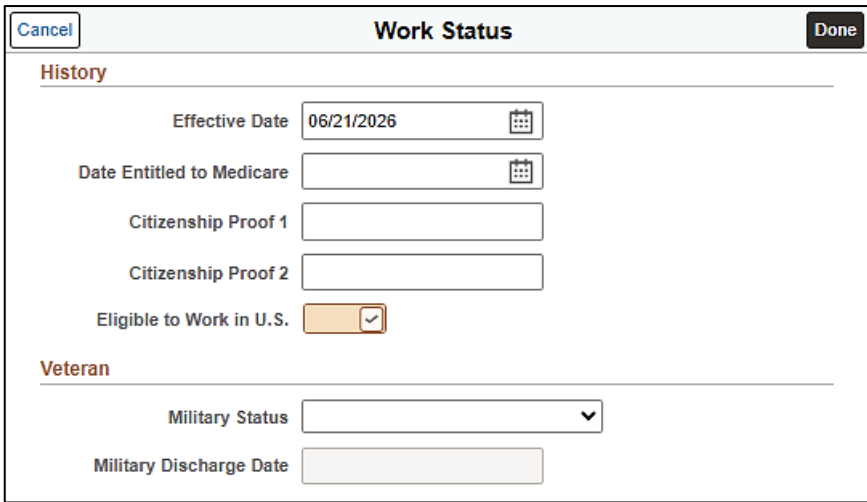
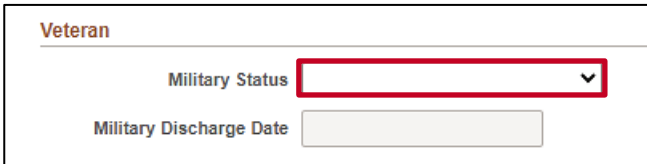
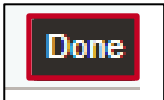
Step	Action
32.	Select the corresponding Email Option Selection radio button option based upon the type of email address entered. Note: The default is “Agency Provided Email”. Email Option Selection ☒ Agency Provided Email ☐ Pending Agency Provided Email ☐ Employee Provided Email 1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except: 2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov
	Once the employee’s business email is obtained, the Pending Agency Provided Email address must be replaced with the Agency Provided Email address. The Email Option Selection radio button option must then be updated to “Agency Provided Email”. The Agency Provided Email address must be provided to the employee as they will need it to register and access Cardinal Employee Self-Services (ESS). If this is not updated, the employee will not be able to register for access to Cardinal ESS. Note: For employees with multiple jobs at different Agencies, the business email must match the Agency of their primary job. • If an employee has both an hourly (wage) and a salaried job, the salaried job will always be the primary job • If an employee has multiple hourly jobs, the oldest job is considered primary For further information on updating email addresses, refer to the Job Aid titled HR351 Viewing and Modifying Personal Data. This Job Aid is located on the Cardinal website in Job Aids under Learning.
33.	Click the Regional tab. Person Details Contact Information Regional Checklist VA Person Info Validation



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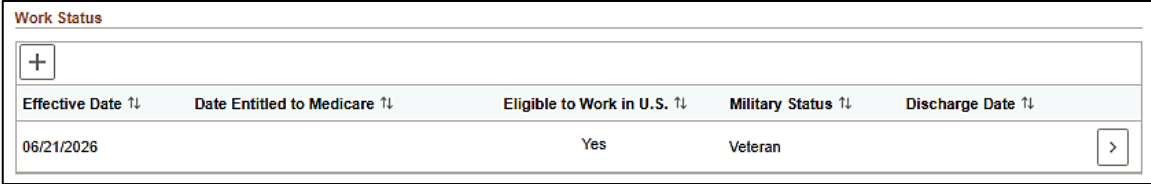
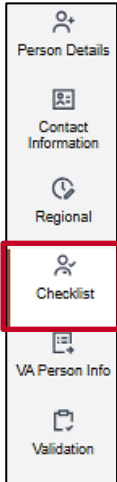
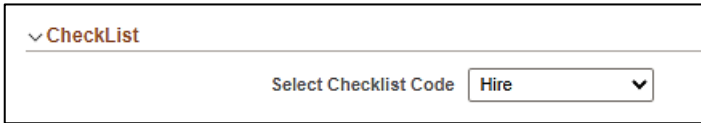
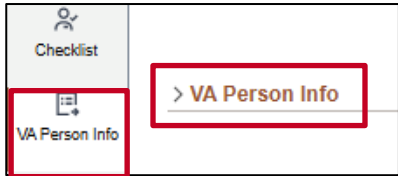
Step	Action
	The Regional section displays. 
	The Regulatory Region field defaults to “USA”. Do not change. 
34.	If provided, click the Ethnic Group Look up icon and select the employee’s ethnic group (optional). Note: This field can be completed by the employee in Employee Self Service (ESS). 
	If the employee identifies with multiple ethnic groups, click the Add a New Row icon (+) and repeat this step. The Primary field toggle is optional.

Step	Action
35.	Click the Add Work Status button in the Work Status section. 
The Work Status page displays in a pop-up window. 	
	The Eligible to Work in the U.S. field toggle defaults to selected. Do not change. 
36.	If the employee provided their military status and service documentation, scroll down as needed, click the Military Status dropdown button, and select the applicable value. 
	The remaining fields on this page are not currently being utilized in Cardinal.
37.	Click the Done button. 



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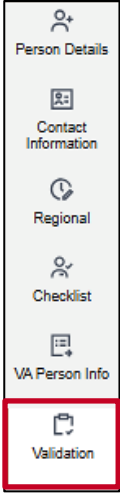
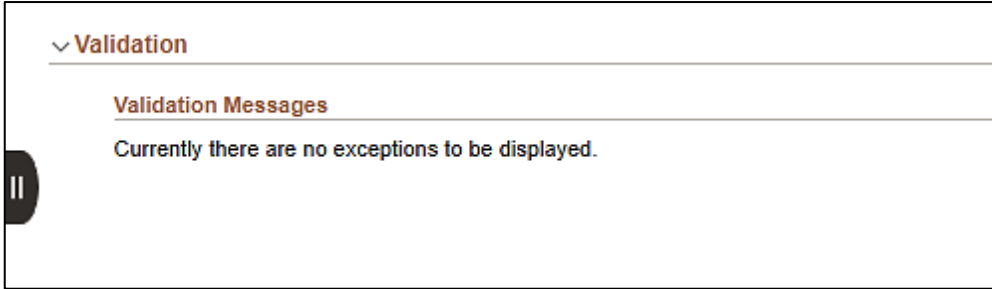
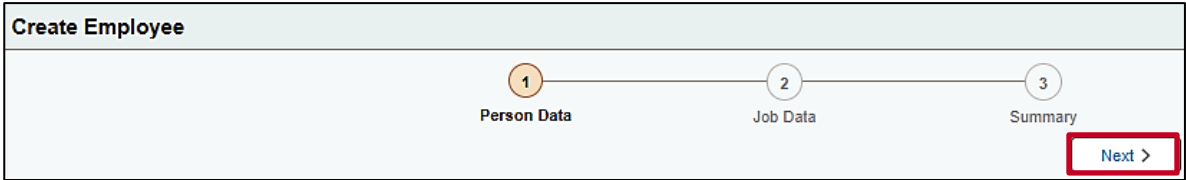
Step	Action
	The Work Status section redispays. 
	The Smoker History section is not currently being utilized in Cardinal.
38.	Click the Checklist tab (optional). 
	The CheckList section displays. 
	The Select Checklist Code field defaults to “Hire”. This is applicable for this process. For more information pertaining to Checklists, see the Job Aid titled HR351 Using a Checklist. This Job Aid is located on the Cardinal website in Job Aids under Learning.
39.	Click the VA Person Info tab and click the Expand button to view the VA Person Info section. 



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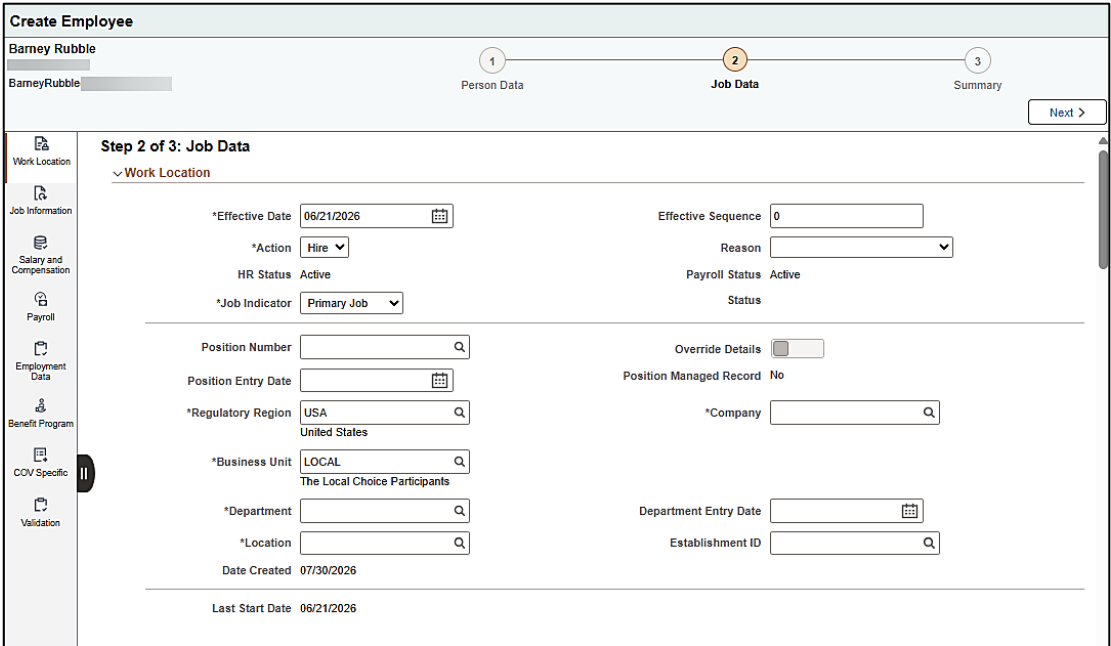
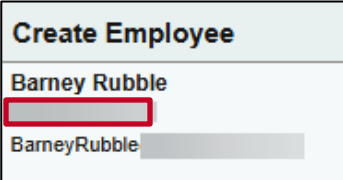
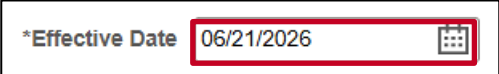
Step	Action
	The VA Person Info section displays. ▼ VA Person Info Linked Participant EmplID Preferred Gender Power Of Attorney Preferred Pronoun
40.	If the employee is linked to another employee of the Commonwealth of Virginia, enter that employee ID in the Linked Participant EmplID field. Linked Participant EmplID
41.	Click the Preferred Gender dropdown button and select the preferred gender provided by the employee. Note: This field can also be completed by the employee in Employee Self Service (ESS). Preferred Gender
42.	Enter the name of the person who has legal Power of Attorney for the employee in the Power of Attorney field (if provided). Power Of Attorney
	The Power of Attorney is very useful in the unfortunate event of a death in service. This person needs to be contacted for decisions regarding payout of leave and/or death certificate request.
43.	Click the Preferred Pronoun dropdown button and select the preferred pronoun provided by the employee. Note: This field can also be completed by the employee in Employee Self Service (ESS). Preferred Pronoun

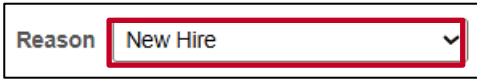
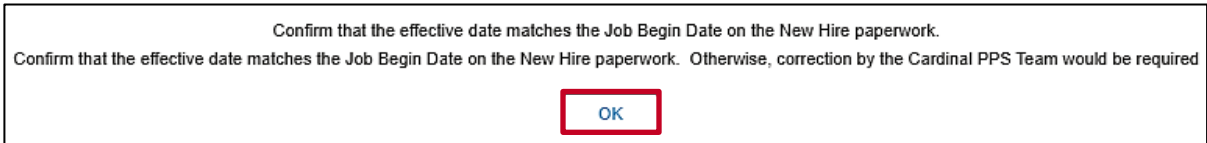
Step	Action
44.	Click the Validation tab. 
	The Validation section displays. 
45.	Click the Next button on the right side of the page at the top. 
	This is the step where information entered for the employee's Personal Data is validated. If there is any missing required information, Cardinal will generate an alert. Note: Do not click the Back button in the browser to go back, as all information that has been entered will be lost. Review the message and go to the sections where the missing information is captured and enter the required information.



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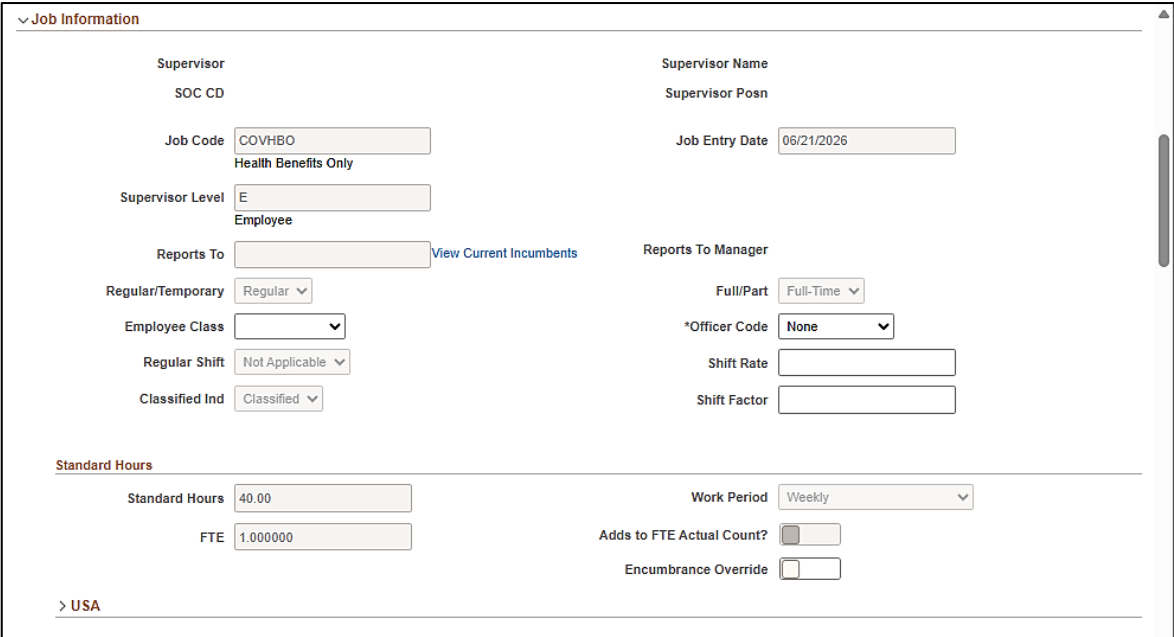
Step	Action
	The Create Employee (Step 2 of 3: Job Data) page displays with the Work Location tab displayed by default. 
46.	Cardinal will auto-assign the Employee ID Number. It is located at the top of the page below the employee's name. Take note of the assigned Employee ID Number. 
47.	The Effective Date field defaults to the date entered in the Personal Details section. If this date is not the first date of employment for the employee, click the Effective Date Calendar icon and select the first date of employment. Note: A help desk ticket is required to adjust the new employee's effective date after their Job Record is saved. 
	The Action field defaults to "Hire" and no other selections are available. 

Step	Action
48.	Click the Reason dropdown button and select “New Hire”. This is the correct selection for this process. 
	Users may see a notification message displayed in a pop-up window. In this case, review the message, confirm the effective date is correct, and then click the OK button. 
	If processing an Inter-Agency Transfer for the employee, use the applicable “Transfer In” (XXX) Reason code. For further information on Inter-Agency Transfers, see the Job Aid titled HR351 Managing an Inter-Agency Transfer. This Job Aid is located on the Cardinal website in Job Aids under Learning.
49.	Enter the employee’s Position Number in the Position Number field. 
	The remaining position related fields on this page will auto-populate once the Position Number is entered.



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
50.	Click the Job Information tab.  The screenshot shows a vertical list of tabs: Work Location, Job Information (highlighted), Salary and Compensation, Payroll, Employment Data, Benefit Program, COV Specific, and Validation.
	The Job Information section displays.  The screenshot shows the 'Job Information' form with the following fields: - Supervisor: SOC CD - Supervisor Name: [Empty] - Supervisor Posn: [Empty] - Job Code: COVHBO - Health Benefits Only: [Empty] - Job Entry Date: 06/21/2026 - Supervisor Level: E - Employee: [Empty] - Reports To: [Empty] View Current Incumbents - Reports To Manager: [Empty] - Regular/Temporary: Regular - Full/Part: Full-Time - Employee Class: [Empty] *Officer Code: None - Regular Shift: Not Applicable - Shift Rate: [Empty] - Classified Ind: Classified - Shift Factor: [Empty] - Standard Hours: 40.00 - Work Period: Weekly - FTE: 1.000000 - Adds to FTE Actual Count?: [Empty] - Encumbrance Override: [Empty] > USA
51.	Review the information within the Job Information section. These values are populated when the Position Number is selected in the Work Location section.



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
52.	Click the Empl Class dropdown button and select the applicable Employee Class. This is a required field. a. If the employee is assigned to a TLC position, select the “TLC EE” value b. If the employee is assigned to an HBO position, select the value that describes the employee filling the job (e.g., ONC, OTO, etc.) Regular/Temporary Regular Empl Class
	The Officer Code field defaults to “None”. Do not change. *Officer Code None
53.	Click the Expand button to expand the USA section. > USA
The USA section displays. USA FLSA Status Nonexempt Work Day Hours *EEO Class None of the Above	
54.	Review the USA section for accuracy. Note: The FLSA Status defaults from the Position Data. If updates are needed, they must be made on the Manage Position page. The EEO Class field is not utilized at this time.



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
55.	Click the Salary and Compensation tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

The **Salary and Compensation** section displays.

Salary and Compensation

Salary Plan

Salary Admin Plan

Grade

Step

Includes Wage Progression Rule ☐

Grade Entry Date

Step Entry Date

Compensation

Compensation Rate 0.000000

*Frequency Annual

Comparative Information

Change Amount 0.000000 USD

Frequency Annual

Change Percent 0.000

Comparison Ratio

Pay Rates

Annual USD

Daily USD

Monthly USD

Hourly USD

Default Pay Components

Pay Components

No Pay Components exists.

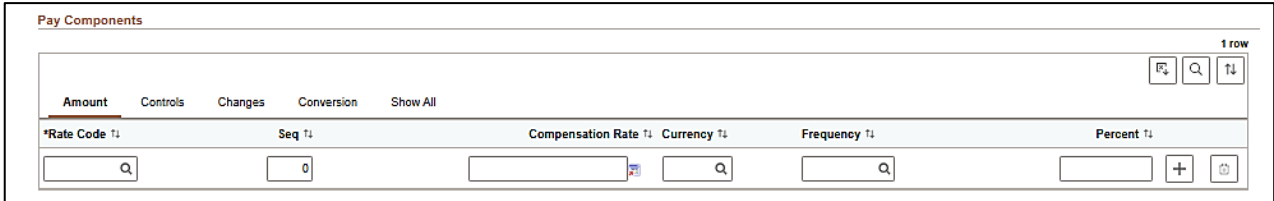
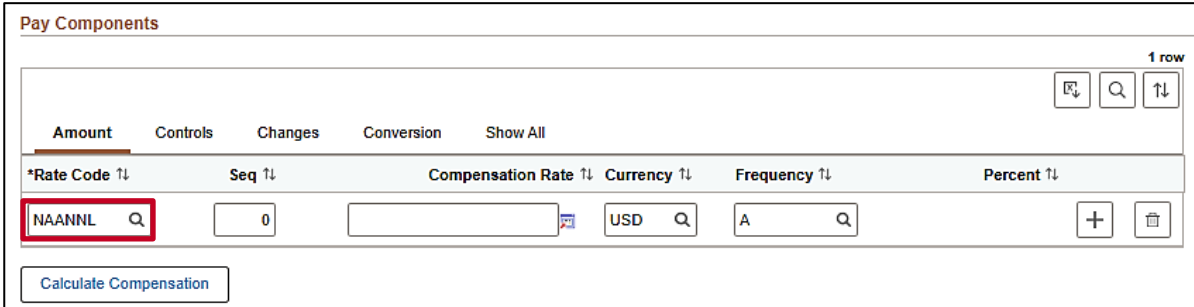
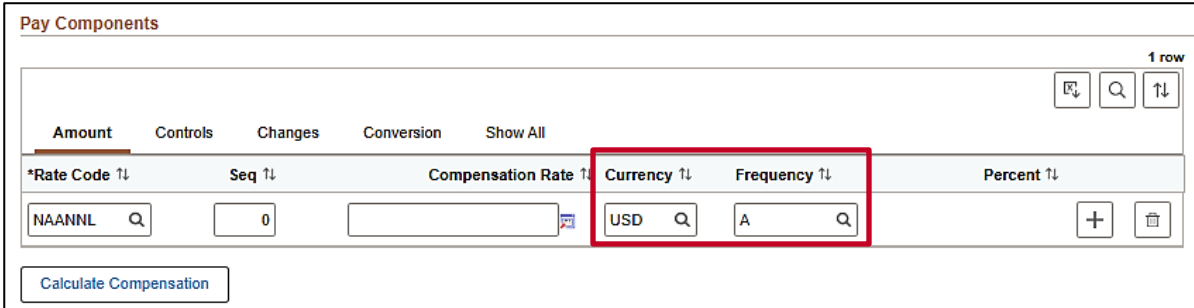
Add Pay Component

Calculate Compensation



HR and Benefits Job Aid

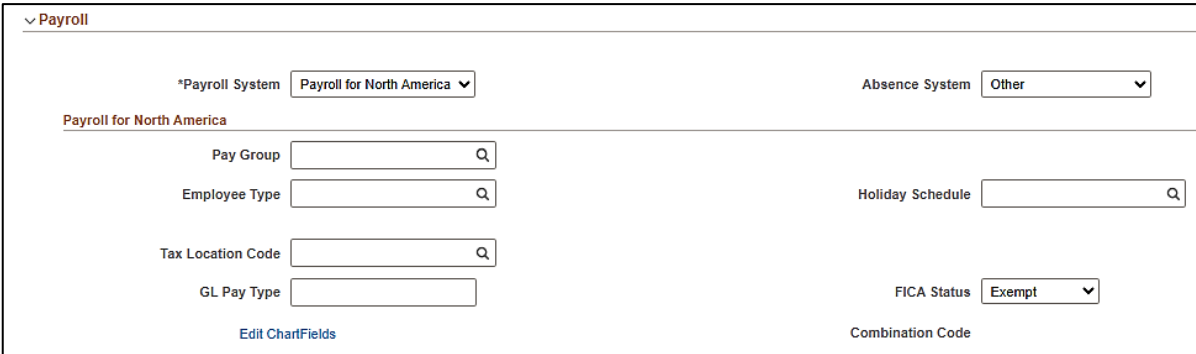
TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
56.	Click the Frequency Look up button in the Compensation section and select “Monthly”. 
57.	Click the Default Pay Components button. 
The Pay Components section displays. 	
58.	Click the Rate Code Look up icon in the Pay Components section and select “NAANNL”. 
	The Currency and Frequency fields default based on the Rate Code selected. Do not change. 



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
59.	Click the Calculate Compensation button. 
60.	Click the Payroll tab. 
The Payroll section displays. 	
	If the Payroll section does not display, click the Expand (>) icon to expand the section. 



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The Payroll System field defaults to “Payroll for North America”. Do not change. The Absence System field defaults to “Other”. Do not change. *Payroll System Payroll for North America Absence System Other
61.	Click the Pay Group Look up icon within Payroll for North America section and select “MNP” (non-payroll). Payroll for North America Pay Group MNP Non-Payroll
	The Employee Type field defaults to “S” (Salaried). Do not change. The Holiday Schedule field defaults to “NOHOL”. Do not change. Employee Type S Holiday Schedule NOHOL Salaried LOCALITY
62.	Click the Tax Location Code Look up icon and select the applicable code based on the location of the employee’s office. Tax Location Code
63.	Click the Benefit Program tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step

Action

The **Benefit Program** section displays.

Benefit Program

Benefit Record Number

0

*Benefits System

Benefits Administration

Benefits Employee Status

Active

Annual Benefits Base Rate

USD

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

Benefits Administration Eligibility

BAS Group ID

Eligible Field 1

Eligible Field 3

Eligible Field 5

Eligible Field 7

Eligible Field 9

Eligible Field 2

Eligible Field 4

Eligible Field 6

Eligible Field 8

Benefit Program Participation Details

1 row

Effective Date ↑↓

Benefit Program ↑↓

Currency Code ↑↓

06/21/2026

170

TLC 048201000 Ben Program

USD

64.

Complete the **Eligible Field 2**, **Eligible Field 3**, **Eligible Field 8**, and **Eligible Field 9** fields:

- Click the **Eligible Field 2 Look up** icon and select the applicable value
- Click the **Eligible Field 3 Look up** icon and select “N” (No)
- Click the **Eligible Field 8 Look up** icon and select “12-12” (12 months, 12 pays)
- Click the **Eligible Field 9 Look up** icon and select the applicable benefits payment breakdown

Benefits Administration Eligibility

BAS Group ID

Eligible Field 1

Eligible Field 3

Eligible Field 5

Eligible Field 7

Eligible Field 9

Eligible Field 2

Eligible Field 4

Eligible Field 6

Eligible Field 8



HR and Benefits Job Aid

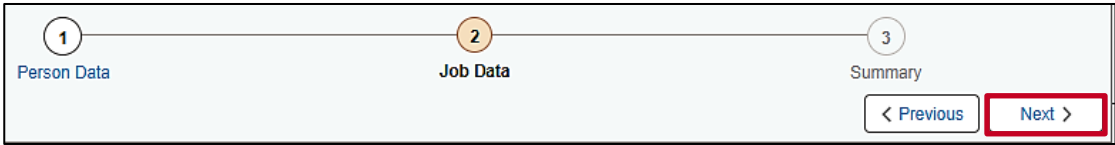
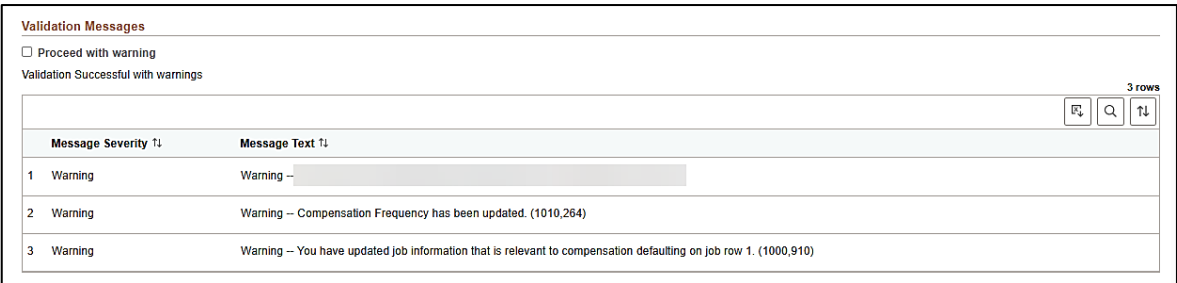
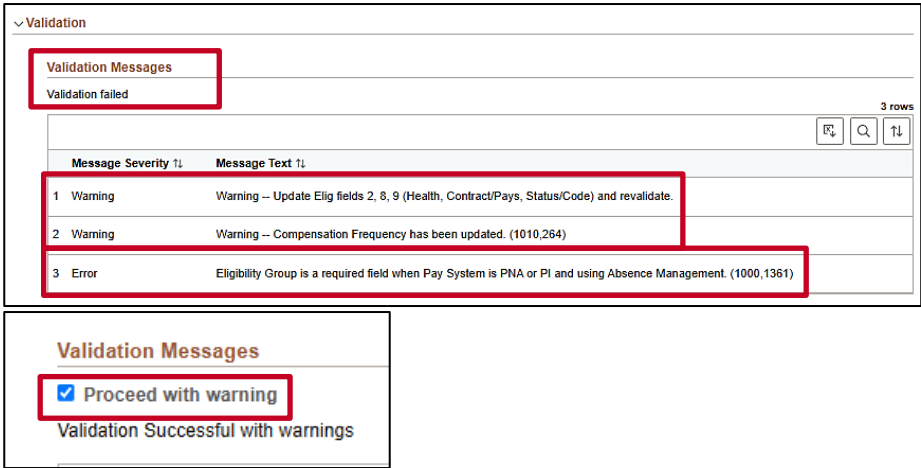
TLC and HBO Completing a New Hire and Benefit Enrollment

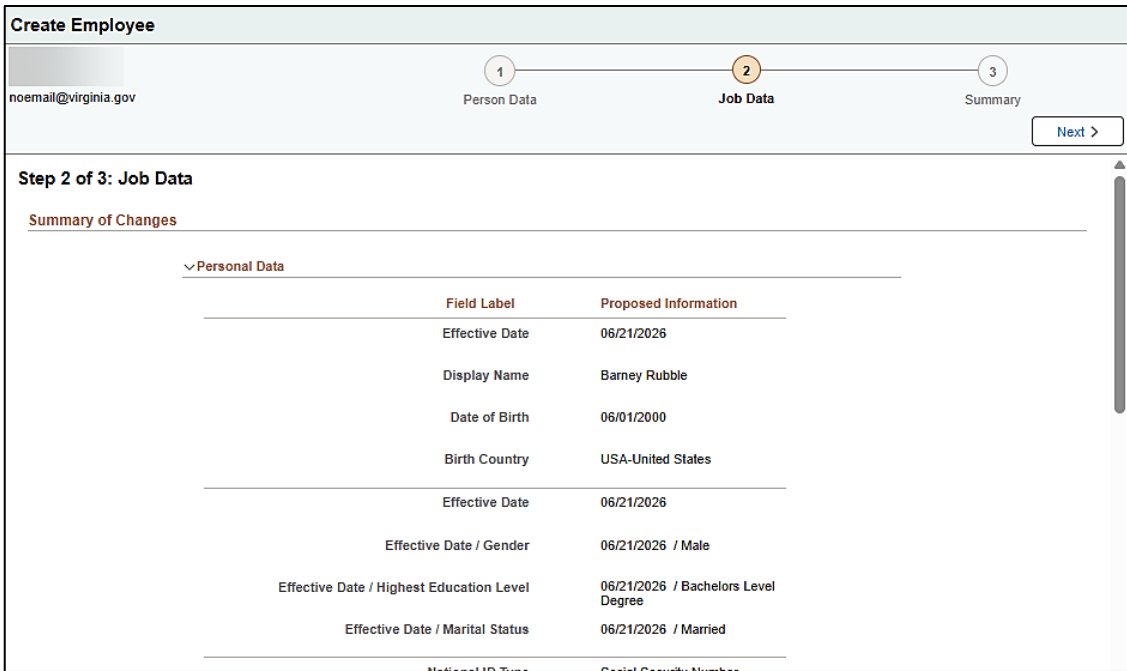
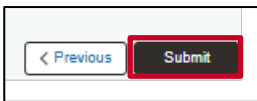
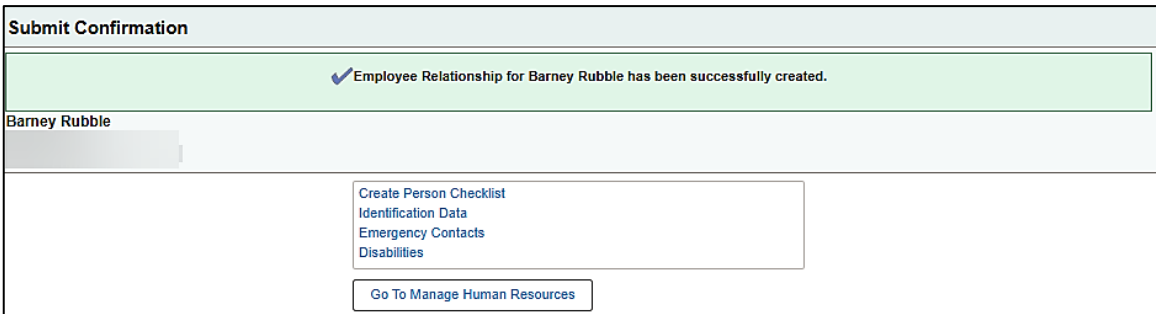
Step	Action
	The Benefit Program Participation Details section populates from previously entered data and is read-only. Benefit Program Participation Details 1 row Effective Date ↑↓ Benefit Program ↑↓ Currency Code ↑↓ 06/21/2026 170 TLC 048201000 Ben Program USD For further information on eligibility configuration valid values, see the Job Aid titled BN361 Overview of the Eligibility Configuration Fields. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
65.	Review all the information entered for the employee using the scroll bar on the right side of the page to go back through the sections. Update anything that is entered incorrectly.
66.	Click the Validation tab.  Work Location  Job Information  Salary and Compensation  Payroll  Employment Data  Benefit Program  COV Specific  Validation
The Validation section displays. Validation Validation Messages Currently there are no exceptions to be displayed.	



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
67.	Click the Next button. 
The Validation Messages section displays. 	
68.	Review the Validation Messages section and click the Next button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting (the Validation Messages section will display an Error message and the validation will fail). Select the Proceed with warning checkbox option if applicable. 

Step	Action
	The Create Employee Step 3 of 3: Summary page displays. 
69.	Review the Summary of Changes section, and then click the Submit button. 
	The Submit Confirmation page displays. 
	Once the record is saved, if anything is incorrect a help desk ticket must be entered to make the correction.



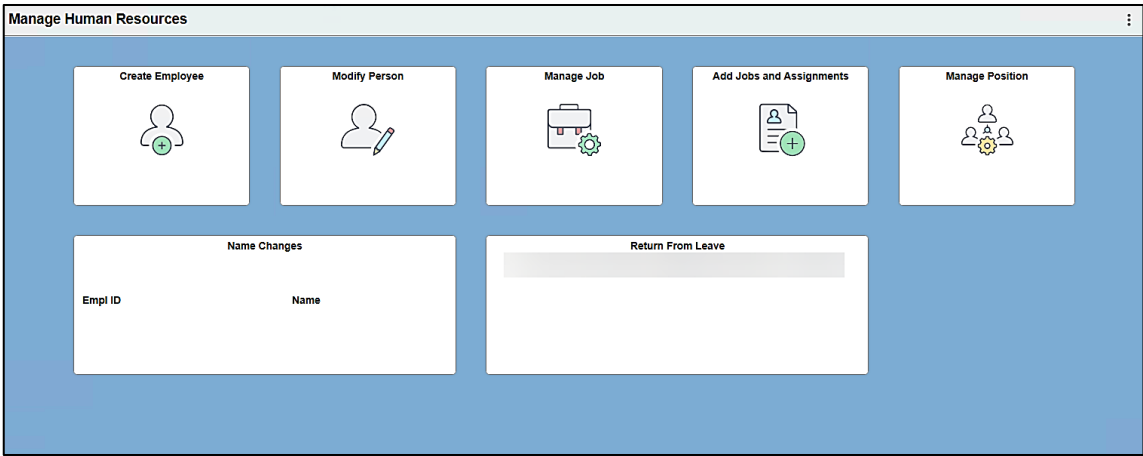
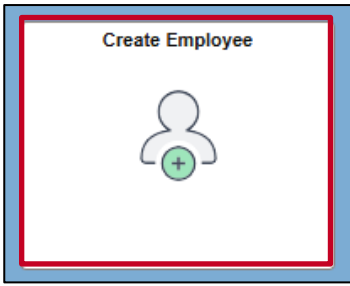
HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	From the Submit Confirmation page, users can directly access the Person Checklist page to review onboarding Checklist items, the Emergency Contact page to enter emergency contact information, and return to the Manage Human Resources homepage using the Go To Manage Human Resources link. The Identification Data and Disabilities links are not accessible for HBO and TLC at this time. Create Person Checklist Identification Data Emergency Contacts Disabilities Go To Manage Human Resources

Hiring a Person When Personal Data (Employee ID) Exists in Cardinal

There are times when only Personal Data exists in Cardinal for a person. When this is the case, a **Potential duplicate** notice will display when attempting to create the employee. To complete the hire, the person must be hired by creating a new employment instance to create an employee record.

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



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action																
	The Create Employee Search page displays. Create Employee Personal Details *National ID Date of Birth First Name Middle Name Last Name Search																
3.	Enter the employee’s SSN in the National ID field. *National ID																
4.	Click the Search button. Search																
	The Create Employee page redisplay with an Information Message and the Potential duplicates section displayed. Create Employee Personal Details *National ID Date of Birth First Name Middle Name Last Name Search Potential duplicates found. Modify the duplicate person or create a new Employee record. Potential duplicates <table><tr><th>Person ID</th><th>Date of Birth</th><th>National ID Country</th><th>National ID Type</th><th>National ID</th><th>First Name</th><th>Last Name</th><th></th></tr><tr><td></td><td>06/01/1990</td><td>United States</td><td>Social Security Number</td><td></td><td>Tony</td><td>Tiger</td><td>Organizational Relationship</td></tr></table>	Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name			06/01/1990	United States	Social Security Number		Tony	Tiger	Organizational Relationship
Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name											
	06/01/1990	United States	Social Security Number		Tony	Tiger	Organizational Relationship										
5.	Click the Organizational Relationship link. Potential duplicates <table><tr><th>Person ID</th><th>Date of Birth</th><th>National ID Country</th><th>National ID Type</th><th>National ID</th><th>First Name</th><th>Last Name</th><th></th></tr><tr><td></td><td>06/01/1990</td><td>United States</td><td>Social Security Number</td><td></td><td>Tony</td><td>Tiger</td><td>Organizational Relationship</td></tr></table> Create Employee	Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name			06/01/1990	United States	Social Security Number		Tony	Tiger	Organizational Relationship
Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name											
	06/01/1990	United States	Social Security Number		Tony	Tiger	Organizational Relationship										



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The Organizational Relationship page displays. Organizational Relationship Tony Tiger noemail@virginia.gov Add Employee Relationship Organizational Relationship Tony Tiger is currently saved with default Person of Interest Type of 'Unknown' Empl ID *Effective Date 07/30/2026 Action Hire Action Reason



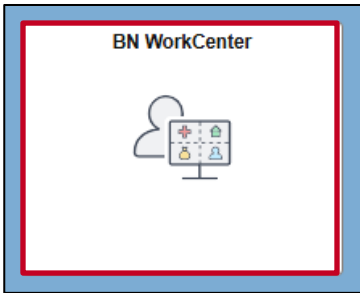
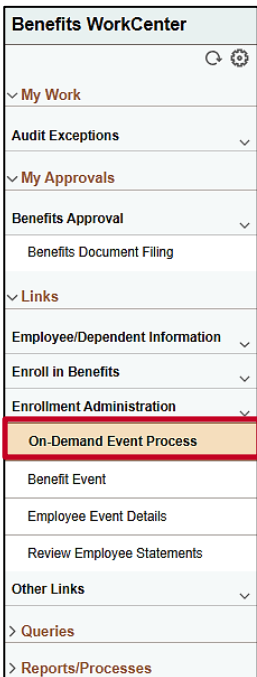
HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The Add Employee Relationship (Step 1 of 2: Job Data) page displays with the Work Location tab displayed by default. Add Employee Relationship Tony Tiger noemail@virginia.gov 1Job Data 2Summary Next > Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation Step 1 of 2: Job Data Work Location *Effective Date07/30/2026 *ActionHire HR StatusActive *Job IndicatorPrimary Job Effective Sequence0 ReasonNew Hire Payroll StatusActive Status Position Number Position Entry Date *Regulatory RegionUSA United States *Business UnitLOCAL The Local Choice Participants *Department *Location Date Created07/30/2026 Last Start Date07/30/2026 Override Details Position Managed RecordNo *Company Department Entry Date Establishment ID
9.	Complete the hire as detailed in the Completing a New Hire section of this Job Aid beginning with Step 49 .

New Hire Benefit Enrollment

Now that New Hire processing is complete, the Benefits Administrator will be able to complete the benefit enrollment elections for the new hire employee. This process is performed on the **On-Demand Event Process** page after the employee submits their Benefits Enrollment form to the BA with all the information necessary to complete the process.

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



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The On-Demand Event Maintenance Find an Existing Value Search page displays. On-Demand Event Maintenance Find an Existing Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Name begins with Second Last Name begins with Empl Record = Last Name begins with Alternate Character Name begins with Show fewer options Case Sensitive Search Clear
3.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. Empl ID begins with
4.	Click the Search button. Search Clear



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The On-Demand Event Process page displays for the selected employee. Barney Rubble Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 2 Show Activities Action Event ID 0 Event Date Status Class Event Status Update Prepare Options Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

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

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

Jonathan Doe

Person ID

Ben Record 0

Help

BAS Activity

1-2 of 2

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☐	0	Manual Event	02/19/2026	0	HR2		+	-
☐	0	Job Data Change	02/19/2026	0	HIR		+	-

OK

Cancel

7. Click the **Select** checkbox option for the HR2 Benefit Event.

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☒	0	Manual Event	02/19/2026	0	HR2		+	-

8. Click the **OK** button.

OK

Cancel



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The On-Demand Event Process page refreshes. Activity Date 02/19/2026Source Manual EventEmpl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HR2 Event ID 0Event DateStatusClass Prepare OptionsEvent Status Enrollment StatementRun Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election EntryEntered 0 of 0 Show Plans Validate/FinalizeErrors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation StatementRun Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify
9.	Review the Activity Date field. The Activity Date is the effective date of the Event that matches the Effective Date on the Job Record from the New Hire transaction completed by the HR Administrator. Note: For HR2 Benefit Events, the Source field will be “Manual Event”, and the Action field will be “HR2”. Activity Date 02/19/2026Source Manual EventEmpl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HR2
10.	Click the Schedule/Prepare Activity button to manually run the Benefits Administration process for this Benefit Event. Note: This will process and close the HR2 Benefit Event. Activity Date 02/19/2026Source Manual EventEmpl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HR2



HR and Benefits Job Aid

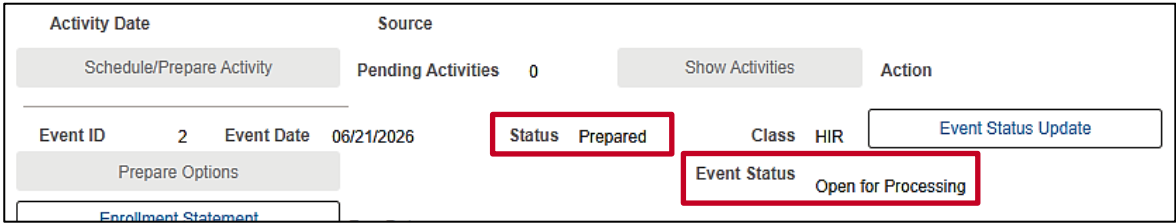
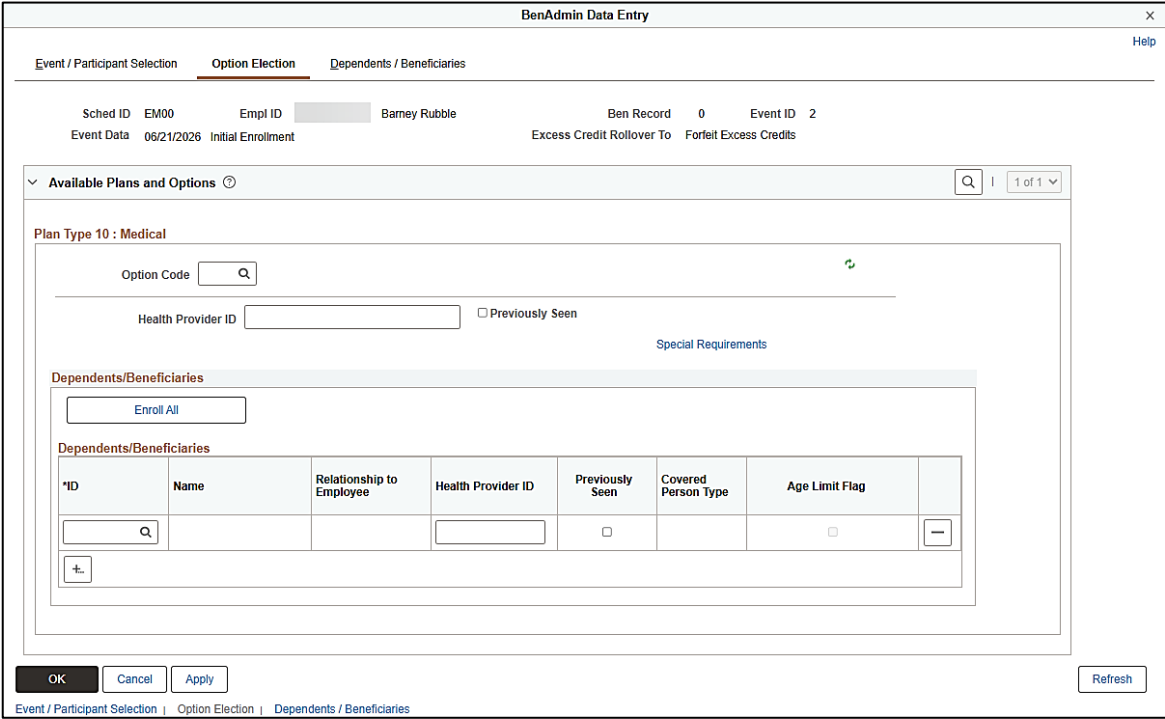
TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	If the HR2 Benefit Event does not process and close automatically, select the Finalize/Apply Defaults checkbox option, and then click the Validate/Finalize button. Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☒ Finalize/Apply Defaults Confirmation Statement Run Date
	A Confirmation message displays in a pop-up window once the automated program completes. Process completed successfully. (3000,530) OK
11.	Click the OK button to close the message. OK
	The On-Demand Event Process page refreshes. Barney Rubble Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 06/21/2026 Status Prepared Class HIR Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 1 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Q Normal Processing Save Return to Search Notify



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
12.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. 
13.	Click the Election Entry button. 
The BenAdmin Data Entry page displays in a pop-up window with the Option Election tab displayed by default. 	
14.	Click the Option Code Look up icon (magnifying glass) within the Plan Type 10: Medical section. 



HR and Benefits Job Aid

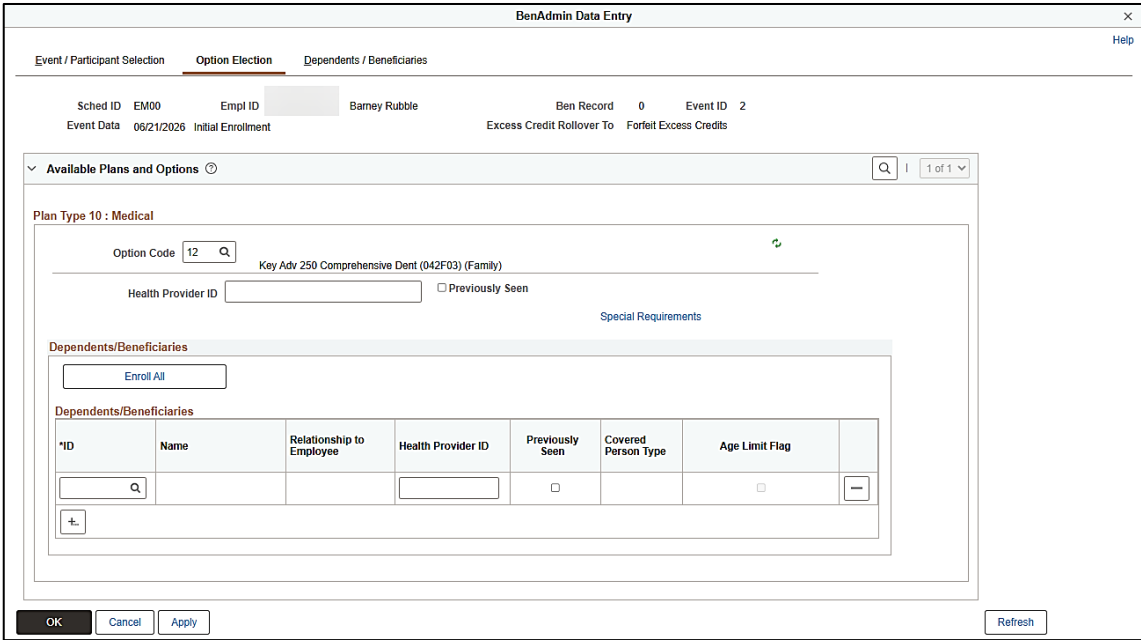
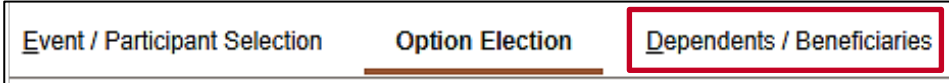
TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action																																																																								
	The Look Up Option Code page displays in a pop-up window. Look Up Option Code × Help Cancel Search Results View 100 < < 1-17 of 17 > > <table><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr><tr><td>1</td><td>Option</td><td>042F01</td><td>1</td></tr><tr><td>10</td><td>Option</td><td>042F03</td><td>2</td></tr><tr><td>11</td><td>Option</td><td>042F03</td><td>3</td></tr><tr><td>12</td><td>Option</td><td>042F03</td><td>4</td></tr><tr><td>13</td><td>Option</td><td>042F04</td><td>1</td></tr><tr><td>14</td><td>Option</td><td>042F04</td><td>2</td></tr><tr><td>15</td><td>Option</td><td>042F04</td><td>3</td></tr><tr><td>16</td><td>Option</td><td>042F04</td><td>4</td></tr><tr><td>2</td><td>Option</td><td>042F01</td><td>2</td></tr><tr><td>3</td><td>Option</td><td>042F01</td><td>3</td></tr><tr><td>4</td><td>Option</td><td>042F01</td><td>4</td></tr><tr><td>5</td><td>Option</td><td>042F02</td><td>1</td></tr><tr><td>6</td><td>Option</td><td>042F02</td><td>2</td></tr><tr><td>7</td><td>Option</td><td>042F02</td><td>3</td></tr><tr><td>8</td><td>Option</td><td>042F02</td><td>4</td></tr><tr><td>9</td><td>Option</td><td>042F03</td><td>1</td></tr><tr><td>W</td><td>Waive Optn</td><td>(blank)</td><td>(blank)</td></tr></table>	Option Code	Option Type	Benefit Plan	Coverage Code	1	Option	042F01	1	10	Option	042F03	2	11	Option	042F03	3	12	Option	042F03	4	13	Option	042F04	1	14	Option	042F04	2	15	Option	042F04	3	16	Option	042F04	4	2	Option	042F01	2	3	Option	042F01	3	4	Option	042F01	4	5	Option	042F02	1	6	Option	042F02	2	7	Option	042F02	3	8	Option	042F02	4	9	Option	042F03	1	W	Waive Optn	(blank)	(blank)
Option Code	Option Type	Benefit Plan	Coverage Code																																																																						
1	Option	042F01	1																																																																						
10	Option	042F03	2																																																																						
11	Option	042F03	3																																																																						
12	Option	042F03	4																																																																						
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15	Option	042F04	3																																																																						
16	Option	042F04	4																																																																						
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9	Option	042F03	1																																																																						
W	Waive Optn	(blank)	(blank)																																																																						
15.	Select the applicable Medical Plan based on the employee’s Benefits Enrollment form by clicking the corresponding link in the corresponding Option Code column. In this example, Option Code “12”, Benefit Plan “042F03” with Coverage Code “4”, will be selected. Note: The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child, and 4 – Employee + 2 or More Dependents (Family). Look Up Option Code × Help Cancel Search Results View 100 < < 1-17 of 17 > > <table><tr><th>Option Code</th><th>Option Type</th><th>Benefit Plan</th><th>Coverage Code</th></tr><tr><td>1</td><td>Option</td><td>042F01</td><td>1</td></tr><tr><td>10</td><td>Option</td><td>042F03</td><td>2</td></tr><tr><td>11</td><td>Option</td><td>042F03</td><td>3</td></tr><tr><td>12</td><td>Option</td><td>042F03</td><td>4</td></tr><tr><td>13</td><td>Option</td><td>042F04</td><td>1</td></tr></table>	Option Code	Option Type	Benefit Plan	Coverage Code	1	Option	042F01	1	10	Option	042F03	2	11	Option	042F03	3	12	Option	042F03	4	13	Option	042F04	1																																																
Option Code	Option Type	Benefit Plan	Coverage Code																																																																						
1	Option	042F01	1																																																																						
10	Option	042F03	2																																																																						
11	Option	042F03	3																																																																						
12	Option	042F03	4																																																																						
13	Option	042F04	1																																																																						



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The BenAdmin Data Entry page redispays with the Option Election tab refreshed. 
	If the employee is single and elected a Benefit Plan with a Coverage Code of “1”, skip to Step 36. If the employee selected a Benefit Plan with any other Coverage Code, the employee’s dependent(s) must be added. Proceed to the next step.
16.	Click the Dependents / Beneficiaries tab. 



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step

Action

The **Dependents / Beneficiaries** page displays.

BenAdmin Data Entry

X

Help

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Barney Rubble

Event ID

2

Event Data

06/21/2026

Initial Enrollment

Benefit Record

0

Excess Credit Rollover To

Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents

OK

Cancel

Apply

Refresh

17. Click the **Change/Add Dependent Data** link in the **Dependent/Beneficiaries Currently on Record** section.

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth

Change/Add Dependent Data



HR and Benefits Job Aid

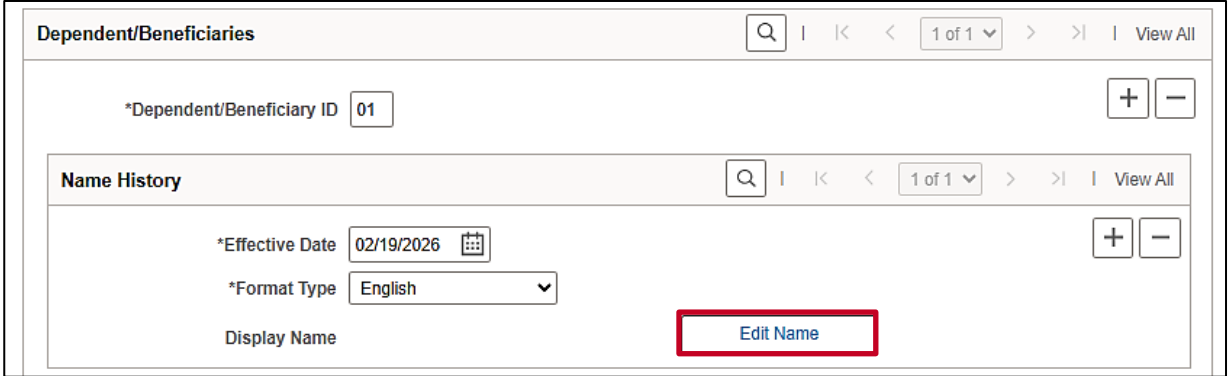
TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The Dependent/Beneficiary page displays in a pop-up window.
	The Dependent/Beneficiary ID field will default to “01” for the first dependent and increment by 1 for each additional dependent subsequently added. The Effective Date field defaults to the Event Date (employee’s hire date for new hire enrollments). This date must be on or before the new hire Event Date and should not be updated.

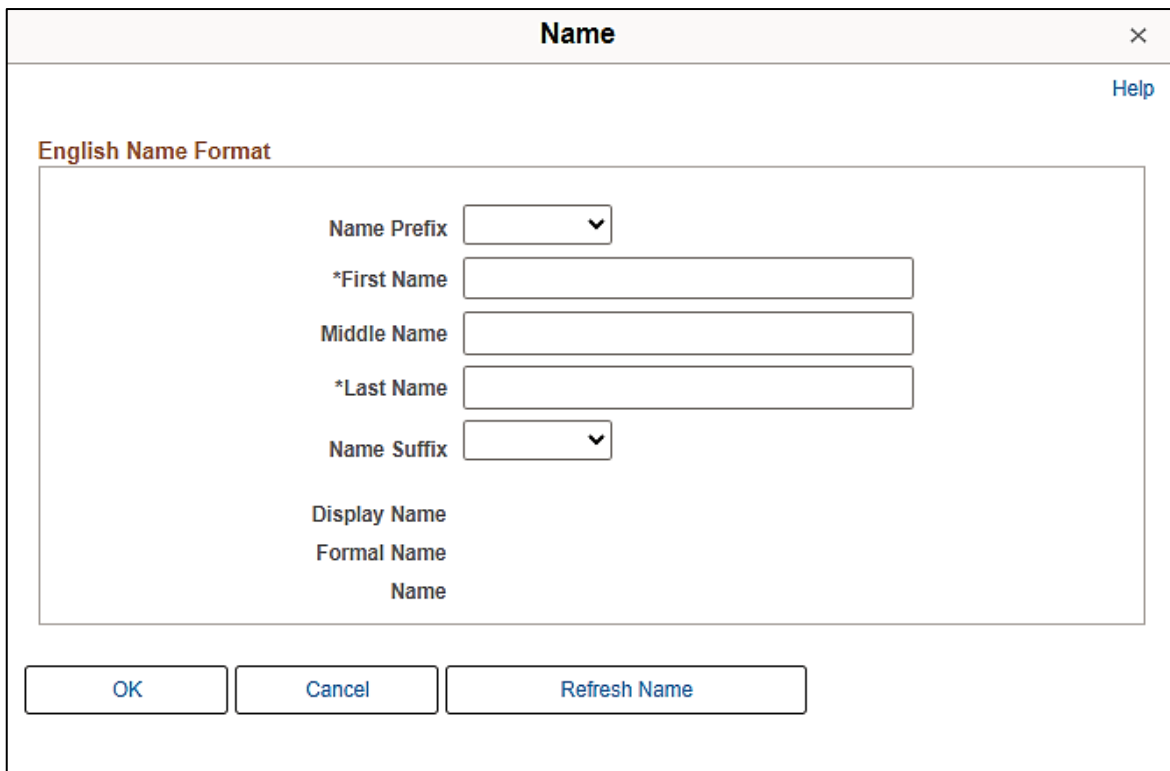


HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
18.	Click the Edit Name button.  The screenshot shows the 'Dependent/Beneficiaries' page. At the top, there is a search bar and a list of dependents. Below this, there is a 'Name History' section. The 'Edit Name' button is highlighted with a red box.

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



The screenshot shows the 'Name' pop-up window. It contains the following fields and buttons:

- Name Prefix (dropdown menu)
- *First Name (text input)
- Middle Name (text input)
- *Last Name (text input)
- Name Suffix (dropdown menu)
- Display Name (text input)
- Formal Name (text input)
- Name (text input)
- OK button
- Cancel button
- Refresh Name button



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
19.	At a minimum, enter the dependent's First and Last Names in the corresponding fields. The Name Prefix, Middle Name, and Name Suffix fields are optional but should be entered as applicable. Name Help English Name Format Name Prefix *First Name Middle Name *Last Name Name Suffix
20.	Click the OK button. OK Cancel Apply
The Name page refreshes with the dependent's name displayed in the Name field in the Name History section. Dependent/Beneficiary Help Name Address Personal Profile Barney Rubble Person ID Dependent/Beneficiaries 1 of 1 + View All *Dependent/Beneficiary ID 01 Name History 1 of 1 + View All *Effective Date 06/21/2026 *Format Type English Name Betty Rubble Edit Name OK Cancel Apply Name Address Personal Profile	

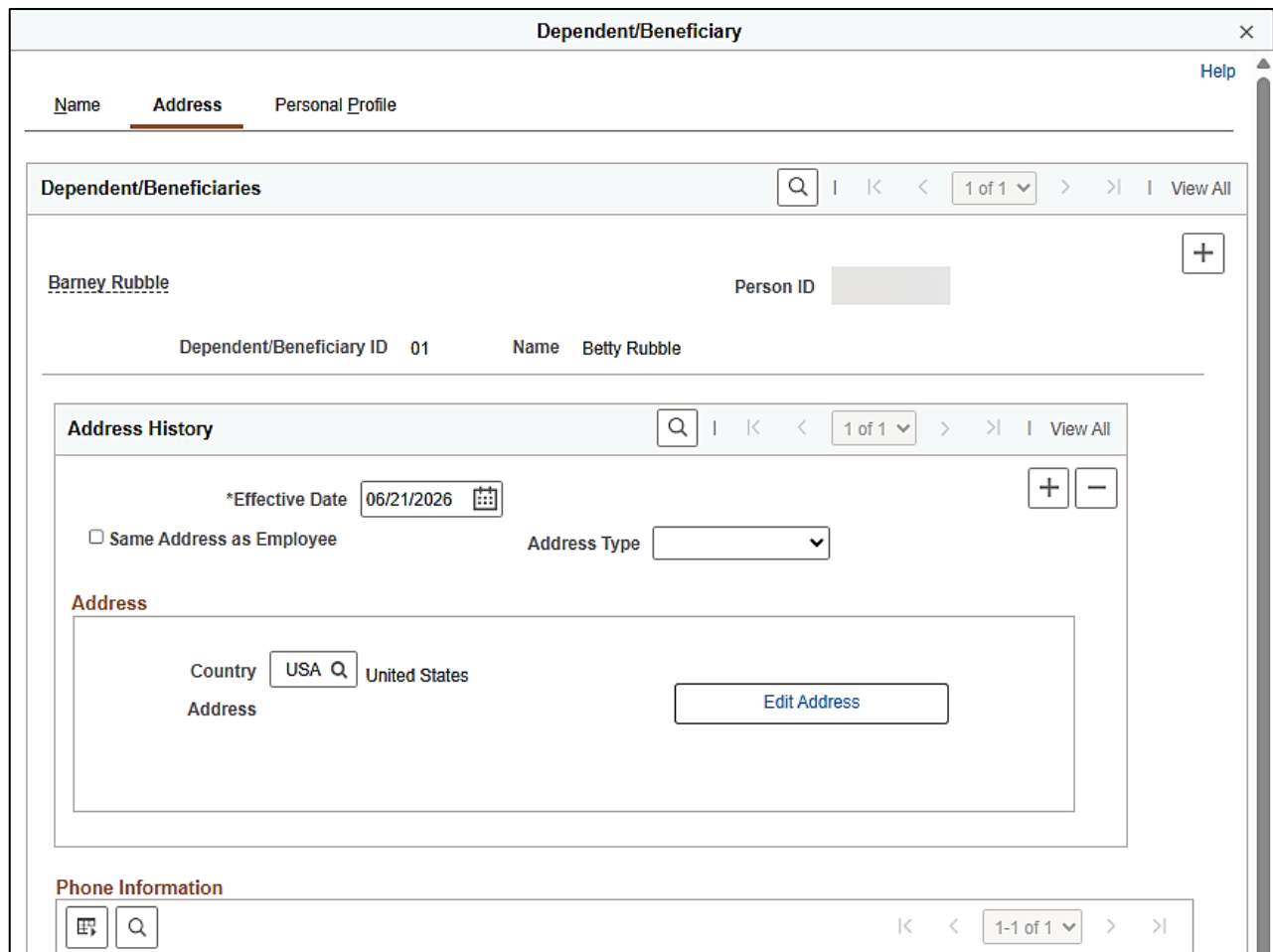


HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
21.	Click the Address tab. 

The **Address** page displays.



Dependent/Beneficiary

Name **Address** Personal Profile

Dependent/Beneficiaries [Search] | |< < 1 of 1 > >| | View All

Barney Rubble Person ID [Redacted] +

Dependent/Beneficiary ID 01 Name Betty Rubble

Address History [Search] | |< < 1 of 1 > >| | View All

*Effective Date 06/21/2026 [Calendar Icon] + -

☐ Same Address as Employee Address Type [Dropdown]

Address

Country USA [Search] United States

Address [Redacted] Edit Address

Phone Information [Phone Icon] [Search] |< < 1-1 of 1 > >|



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
22.	Complete the address information as applicable for the dependent by either: Clicking the Same Address as Employee checkbox option (applicable for this example) Address History *Effective Date 06/26/2026 ☒ Same Address as Employee Address Type Home or: Clicking the Address Type dropdown button provided, selecting the applicable Address Type, and then clicking the Edit Address button. The Edit Address page will display in a pop-up window, and the applicable address information can be entered. Address History *Effective Date 02/19/2026 ☐ Same Address as Employee Address Type Address Country USA United States Address Edit Address



HR and Benefits Job Aid

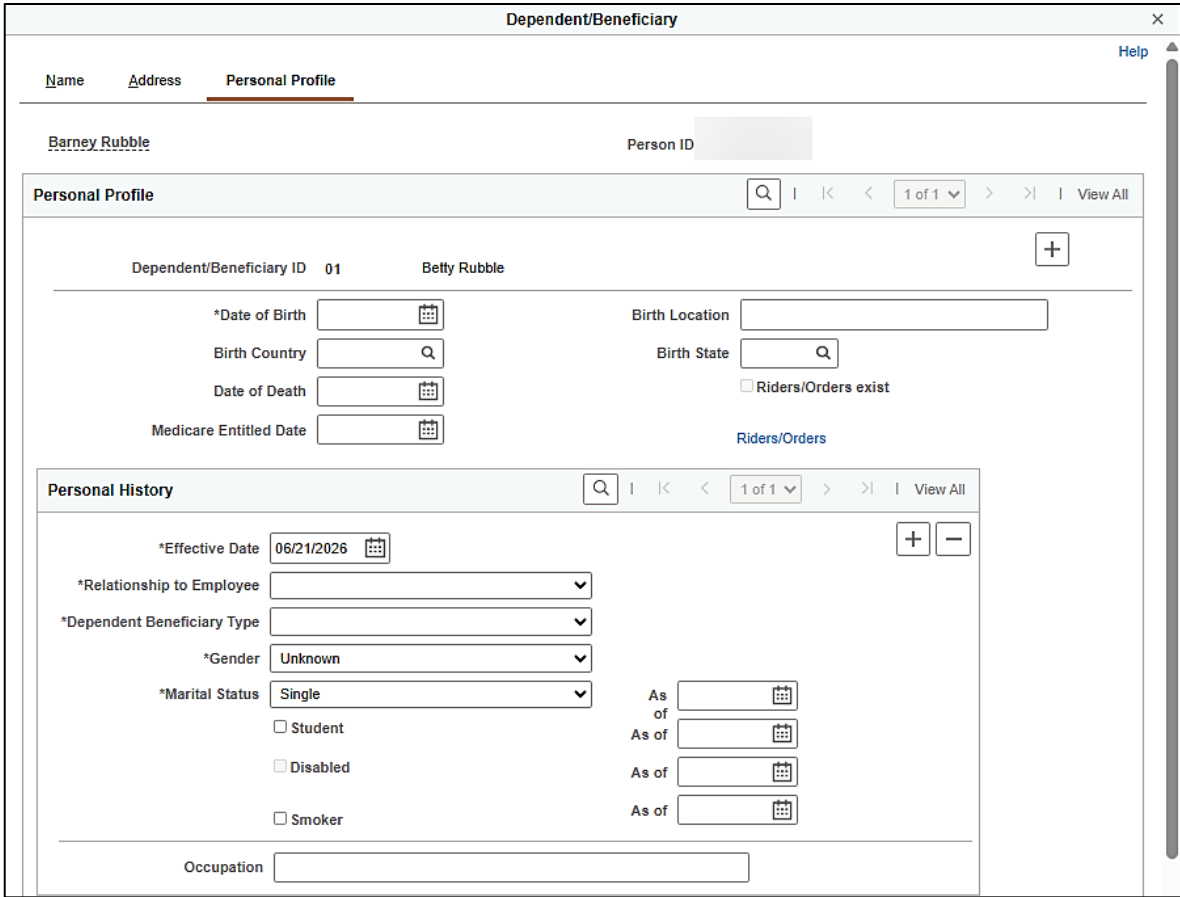
TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action										
	The Address page refreshes with Address History section with the dependent's address information displayed in the Address History section. Dependent/Beneficiary Name Address Personal Profile Dependent/Beneficiaries Barney Rubble Person ID Dependent/Beneficiary ID 01 Name Betty Rubble Address History *Effective Date 06/21/2026 ☒ Same Address as Employee Address Type Home Employee's Current Address Country USA United States Address 123 Limestone Way Richmond, VA 23221 Phone Information <table><thead><tr><th>Same As Employee</th><th>Phone Type</th><th>Telephone</th><th>Extension</th><th>Preferred</th></tr></thead><tbody><tr><td>☐</td><td></td><td></td><td></td><td>☐</td></tr></tbody></table>	Same As Employee	Phone Type	Telephone	Extension	Preferred	☐				☐
Same As Employee	Phone Type	Telephone	Extension	Preferred							
☐				☐							



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The Personal Profile page displays. 
	The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The Student and Smoker checkbox options are not required in Cardinal, and this information is not transmitted to the Plan Provider (Vendor).
24.	Click the Date of Birth Calendar icon and select the dependent's date of birth. 
	The Effective Date in the Personal History section defaults to the date of hire. Do not change.



HR and Benefits Job Aid

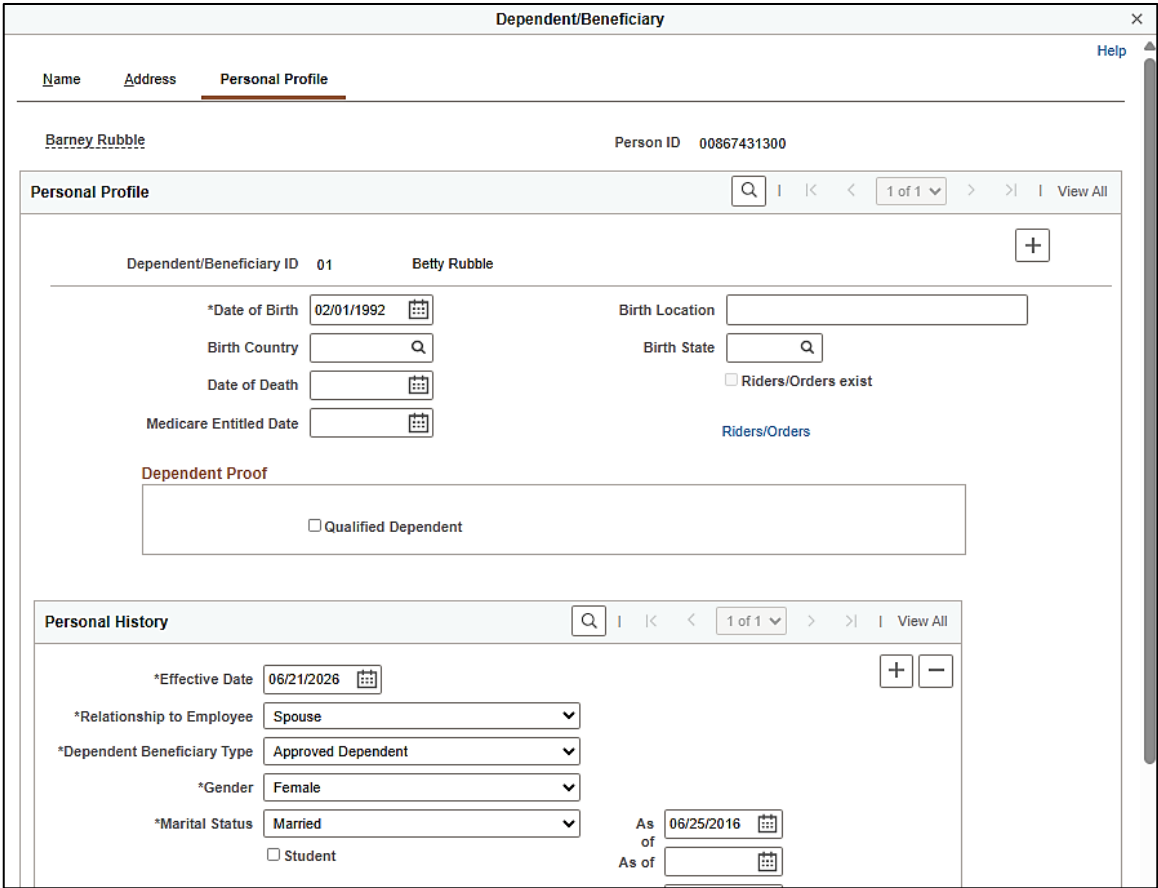
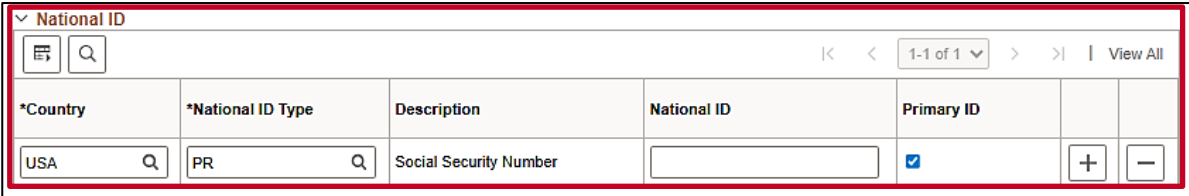
TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
25.	Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee. *Relationship to Employee
26.	Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent". *Dependent Beneficiary Type Approved Dependent
27.	Click the Gender dropdown button and select the dependent's gender ("Male" or "Female"). *Gender Unknown
28.	The Marital Status field defaults to "Single". Update as needed for the dependent. *Marital Status Single
29.	If any status other than "Single" is selected, the Marital Status As of field will default to the date of hire and can be updated using the Marital Status As of Calendar icon. Note: Leaving this date as the hire date does not impact benefits. *Marital Status Married As of 06/25/2016



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The updated Dependent/Beneficiary page displays.  The screenshot shows the 'Dependent/Beneficiary' page for Barney Rubble. The 'Personal Profile' section includes fields for Date of Birth (02/01/1992), Birth Country, Date of Death, Medicare Entitled Date, Birth Location, Birth State, and a checkbox for 'Riders/Orders exist'. The 'Dependent Proof' section has a checkbox for 'Qualified Dependent'. The 'Personal History' section includes fields for Effective Date (06/21/2026), Relationship to Employee (Spouse), Dependent Beneficiary Type (Approved Dependent), Gender (Female), Marital Status (Married), and a checkbox for 'Student'. There are also 'As of' date fields.
30.	Scroll down to the National ID section.  The screenshot shows the 'National ID' section with a table containing one row of data. The table has columns for Country, National ID Type, Description, National ID, and Primary ID. The data row shows 'USA' for Country, 'PR' for National ID Type, 'Social Security Number' for Description, an empty field for National ID, and a checked box for Primary ID.



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action														
31	Enter the dependent's Social Security Number (SSN) in the National ID field. If the employee did not provide the dependent's SSN, this field can be left blank for now. However, the SSN should be obtained and entered as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. Benefits Administrators can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN. ▼ National ID << < 1-1 of 1 > >> View All <table><tr><th>*Country</th><th>*National ID Type</th><th>Description</th><th>National ID</th><th>Primary ID</th><th></th><th></th></tr><tr><td>USA</td><td>PR</td><td>Social Security Number</td><td></td><td>☒</td><td>+</td><td>-</td></tr></table>	*Country	*National ID Type	Description	National ID	Primary ID			USA	PR	Social Security Number		☒	+	-
*Country	*National ID Type	Description	National ID	Primary ID											
USA	PR	Social Security Number		☒	+	-									
32.	Click the OK button. OK Cancel Apply														
The Dependents / Beneficiaries page redisplay. BenAdmin Data Entry Event / Participant Selection Option Election Dependents / Beneficiaries Schedule ID EM00 Employee ID Barney Rubble Event ID 2 Event Data 06/21/2026 Initial Enrollment Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits Dependent/Beneficiaries Currently on Record <table><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr><tr><td>Betty Rubble</td><td>Spouse</td><td>Approved Dependent</td><td>02/01/1992</td></tr></table> Change/Add Dependent Data Elections Requiring Supplemental Information <table><tr><td>10</td><td>Medical</td><td>Enroll Dependents</td></tr></table> OK Cancel Apply Refresh		Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Betty Rubble	Spouse	Approved Dependent	02/01/1992	10	Medical	Enroll Dependents			
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth												
Betty Rubble	Spouse	Approved Dependent	02/01/1992												
10	Medical	Enroll Dependents													
33.	If additional dependents need to be added, proceed to the next step. If no additional dependents need to be added, skip to Step 36.														



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action								
34.	Click the Change/Add Dependent Data link in the Dependent/Beneficiaries Currently on Record section. Dependent/Beneficiaries Currently on Record <table><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr><tr><td>Betty Rubble</td><td>Spouse</td><td>Approved Dependent</td><td>02/01/1992</td></tr></table> Change/Add Dependent Data	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Betty Rubble	Spouse	Approved Dependent	02/01/1992
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth						
Betty Rubble	Spouse	Approved Dependent	02/01/1992						
The Dependent/Beneficiary page displays with the Name tab displayed by default. Dependent/Beneficiary Name Address Personal Profile Barney Rubble Person ID Dependent/Beneficiaries 1 of 1 View All *Dependent/Beneficiary ID 01 + Name History 1 of 1 View All *Effective Date 06/21/2026 + - *Format Type English Name Betty Rubble Edit Name OK Cancel Apply Name Address Personal Profile									
35.	Click the Add a New Row icon (+) within the Dependent/Beneficiaries section. Dependent/Beneficiaries 1 of 1 View All *Dependent/Beneficiary ID 01 + -								



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action												
	The Name page refreshes with a new row in the Dependent/Beneficiaries section ("2 of 2" in this example). The Dependent/Beneficiary ID field increments by one ("02" in this example as this is the second dependent being added). Repeat Steps 18 – 32 to complete the data entry for the next dependent and then repeat as needed until all dependents have been added. Dependent/Beneficiary Name Address Personal Profile Barney Rubble Person ID Dependent/Beneficiaries 2 of 2 *Dependent/Beneficiary ID 02 Name History 1 of 1 *Effective Date 06/21/2026 *Format Type English Name Edit Name OK Cancel Apply Name Address Personal Profile												
	i All dependents that have been added display in the Dependent/Beneficiaries Currently on Record section. Dependent/Beneficiaries Currently on Record <table border="1"><thead><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr></thead><tbody><tr><td>Betty Rubble</td><td>Spouse</td><td>Approved Dependent</td><td>02/01/1992</td></tr><tr><td>Bam Bam Rubble</td><td>Child</td><td>Approved Dependent</td><td>07/04/2018</td></tr></tbody></table>	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Betty Rubble	Spouse	Approved Dependent	02/01/1992	Bam Bam Rubble	Child	Approved Dependent	07/04/2018
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth										
Betty Rubble	Spouse	Approved Dependent	02/01/1992										
Bam Bam Rubble	Child	Approved Dependent	07/04/2018										
36.	Click the Option Election tab. Event / Participant Selection Option Election Dependents / Beneficiaries												



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **Option Election** page displays.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID [redacted] Barney Rubble Ben Record 0 Event ID 2
Event Data 06/21/2026 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 12 Key Adv 250 Comprehensive Dent (042F03) (Family)
Health Provider ID [redacted] ☐ Previously Seen
[Special Requirements](#)

Dependents/Beneficiaries

[Enroll All](#)

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

[+...](#)

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

37. Enroll the dependents in the previously selected Medical Plan by either:
Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example)

Dependents/Beneficiaries

[Enroll All](#)

or:

Adding the applicable dependents individually using the **ID Look up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (+...).

Dependents/Beneficiaries

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

[+...](#)



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **Option Election** page redisplay.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID [redacted] Barney Rubble Ben Record 0 Event ID 2
Event Data 06/21/2026 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 12 Key Adv 250 Comprehensive Dent (042F03) (Family)
Health Provider ID [redacted] ☐ 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	Betty Rubble	Spouse	[redacted]	☐	Spouse	☐	—
02	Bam Bam Rubble	Child	[redacted]	☐	Child	☒	—

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

38. The enrolled dependents display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.

Dependents/Beneficiaries							
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Betty Rubble	Spouse	[redacted]	☐	Spouse	☐	—
02	Bam Bam Rubble	Child	[redacted]	☐	Child	☒	—

39. Click the **OK** button.

OK Cancel Apply



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	The On-Demand Event Process page redisplay. Barney Rubble Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 06/21/2026 Status Entered Class HIR Event Status Update Prepare Options Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 1 of 1 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
40.	Confirm the Status is “Entered”, and the Event Status is “Open for Processing”. Barney Rubble Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 06/21/2026 Status Entered Class HIR Event Status Update Prepare Options Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 1 of 1 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
41.	Click the Validate/Finalize button to manually run the Benefits Administration process for this Benefit Event. Note: This process will validate elections, close the event, and send the elections to the benefits vendors. Election Entry Entered 1 of 1 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
	A Confirmation message displays in a pop-up window once the automated program completes. Process completed successfully. (3000,530) OK
42.	Click the OK button to close the message. OK
	The On-Demand Event Process page refreshes. <u>Barney Rubble</u> Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 06/21/2026 Status Finalized - Enrolled Class HIR Event Status Update Prepare Options Event Status Closed to Processing Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
43.	Confirm that the Status is “Finalized - Enrolled” and the Event Status is “Closed to Processing”. Barney Rubble Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 06/21/2026 Status Finalized - Enrolled Class HIR Event Status Update Prepare Options Event Status Closed to Processing Enrollment Statement