Cardinal Impact Guide:

Benefits

September 2022

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# **Administer Event Maintenance: Maintain Enrollments - System Generated**

## BN01: Life Event Benefit Changes

**Who is impacted?**

Employees and Benefits Administrators

**Process Change:**

Benefit eligibility is systematically evaluated based on Office of Health Benefits (OHB) established benefit rules. A benefit event (i.e., enrollment opportunity) is automatically created when applicable job and personal data changes are made.

Employees can use Employee Self-Service (ESS) to make benefit enrollment changes based on system-generated benefit events (e.g., hires, LOA, location change).

**VCCS Impact:**

This automated process will improve policy compliance and allow the agency Benefits Administrator (BA) role to focus on managing benefit changes for their employees.

The agency BA role will no longer need to enter these changes unless the employee cannot use self-service.

The agency BA role will review benefit reports to identify when employees need to take an enrollment action.

**Resources:**

[ESS How to Create a Life Event](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/ESS%20How%20to%20Create%20a%20Life%20Event.pdf) – Job Aid

[ESS How to Create a Life Event](https://youtu.be/9lRVAive8Y4) – Video

## BN02: Position and Job Data Required to Process Benefit Enrollments

**Who is impacted?**

HR Technicians

**Process Change:**

Unlike BES, Cardinal requires a minimum amount of position and job data, in addition to personal data, to process benefit enrollments.

**VCCS Impact:**

Agencies will need to maintain a minimum amount of position and job data for HR Level 3 employees in Cardinal to process benefit enrollments.

VCCS is an interfacing agency and position and job data will be sent to Cardinal.

**Resources:**

[New Hire Guide](https://nam11.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.cardinalproject.virginia.gov%2Fsites%2Fdefault%2Ffiles%2F2021-07%2FHR351%2520Completing%2520a%2520New%2520Hire.pdf&data=05%7C01%7Cshjones%40vccs.edu%7C4bbcb857d5f34e491c7f08da9cbf9244%7Cfab6beb5360442dfbddcf4e9ddd654d5%7C0%7C0%7C637994643874898850%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=X%2BlY5a%2FeCeU%2BUc7V%2FoA7LHo%2FH%2BsDFeZGQYNftluUmPE%3D&reserved=0)

## BN03: Unpaid Leave and Benefits Termination

**Who is impacted?**

College Benefits Specialists

**Process Change:**

In BES, when an employee is put on unpaid leave, a future-dated benefit termination record is created.

Cardinal will not automatically terminate healthcare benefits for employees on unpaid leave.

Healthcare benefits will remain active until agency HR staff terminates the employee in Cardinal.

**VCCS Impact:**

Agency staff will need to monitor LOA reports to determine when to terminate the employee.

**Resources:**

[BN361 Managing Leave of Absence](https://www.cardinalproject.virginia.gov/sites/default/files/2022-05/BN361_Managing%20Leave%20of%20Absence.pdf) – Job Aid

## BN04: Federally Mandated Healthcare Notices

**Who is impacted?**

Benefit Administrators

**Process Change:**

Federally mandated healthcare notice language (e.g., General Notice of Extended/COBRA Continuation Coverage Rights, CHIP Notice) will now be included in automated confirmation statements for healthcare enrollees.

**VCCS Impact:**

Agencies will no longer need to generate and send separate federally mandated healthcare notices to employees who enroll in healthcare and Flexible Spending Accounts (FSA).

With the exception of COBRA General Notice distributed upon eligibility for Health coverage, Agencies no longer need to create and send COBRA notification letters upon COBRA events. OHB will also administer COBRA enrollment. Agencies will no longer need to generate and send separate federally mandated healthcare notices to employees who enroll in healthcare and Flexible Spending Accounts (FSA) with the exception of COBRA General Notice.

**Resources:**

[BN361Benefit Enrollment and Maintenance](https://cardinalproject.virginia.gov/sites/default/files/2021-07/BN361_Benefit%20Enrollment%20and%20Maintenance_Course.pdf) – Instructor Led Training Guide

## BN05: Life Event Benefit Changes

**Who is impacted?**

Benefit Administrators and Employees

**Process Change:**

Birth, adoption, marriage, and divorce are the only life events employees will be able to initiate changes for through ESS.

The agency Benefits Administrator (BA) role must approve the change once documentation is received.

**VCCS Impact:**

Other than birth, adoption, marriage, and divorce life events, all other life events will need to be initiated by the agency BA role when the employee requests changes and provides documentation.

**Resources:**

[BN361Benefit Enrollment and Maintenance](https://cardinalproject.virginia.gov/sites/default/files/2021-07/BN361_Benefit%20Enrollment%20and%20Maintenance_Course.pdf) – Instructor Led Training Guide

[ESS How to Create a Life Event](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/ESS%20How%20to%20Create%20a%20Life%20Event.pdf) – Job Aid

[ESS How to Create a Life Event](https://youtu.be/9lRVAive8Y4) – Video

[BN361 Completing a Manual Event](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/BN361_Completing%20a%20Manual%20Event.pdf) - Job Aid

[BN361 Completing a Manual Event Locality](https://www.cardinalproject.virginia.gov/sites/default/files/2021-11/BN361_Completing%20a%20Manual%20Event_Locality.pdf) – Job Aid

## BN06: FSA No Longer Waived Due to Waived Healthcare Benefits After Life Event

**Who is Impacted?**

Benefit Administrators

**Process Change:**

In BES, if an employee waives healthcare coverage for a life event change, the FSA enrollments are automatically waived in error.

Cardinal will not automatically waive FSA enrollments when the employee has a life event change and waives healthcare coverage.

**VCCS Impact:**

Agencies will no longer need to re-enroll employees in FSA when the employee waives healthcare coverage related to life event changes.

**Resources:**

## BN07: Employee Enrollment Interface Roles

**Who is impacted?**

Payroll and Benefits Administrator

**Process Change:**

In Cardinal, VRS retirement plans, International City/County Management Association (ICMA) deferred compensation plans, and Fringe Benefits Management Company (FBMC) 403b plans are set up and maintained in Benefits.

Interfaces will maintain ongoing employee enrollments.

The agency Benefits Administrator role, instead of the Payroll Officer, will be responsible for monitoring the related interface error reports.

**VCCS Impact:**

The agency Benefits Administrator role will need to analyze errors and make/coordinate necessary corrections.

**Resources:**

[BN361Benefit Enrollment and Maintenance](https://cardinalproject.virginia.gov/sites/default/files/2021-07/BN361_Benefit%20Enrollment%20and%20Maintenance_Course.pdf) – Instructor Led Training Guide

# **Administer COBRA**

## BN08: COBRA Processing in Cardinal

**Who is impacted?**

Benefits Administrator

**Process Change:**

In Cardinal, COBRA processing will be centralized and handled by OHB.

**VCCS Impact:**

Agencies will no longer need to create and send COBRA notification letters, administer COBRA enrollment, and track COBRA payments.

The agency Benefits Administrator role will be able to review COBRA enrollment reports to see the status of employees who experience a COBRA event.

**Resources:**

[BN361 COBRA Review Event Summary Page Overview](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/BN361%20COBRA%20Review%20Event%20Summary%20Page.pdf) – Job Aid

# **Benefits Reconciliation**

## BN09: Healthcare Reconciliation Process

**Who is impacted?**

Payroll

**Process Change:**

The Healthcare Reconciliation process will automatically compare Cardinal effective dated healthcare enrollments with payroll deductions to determine and report variances of healthcare premiums, replacing point-in-time view of BES enrollments.

The process will now automatically generate General Ledger (GL) journals to refund overpayments to the agency.

**VCCS Impact:**

Agencies should have fewer Agency-to-Agency (ATA) journals to process for healthcare items.

**Resources:**

[HCM Reports Catalog](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/HCM%20Reports%20Catalog.pdf) – Job Aid

* Benefit Contribution Register Report (RBN055)
* Health Benefit Recon Exception Report (RHR070)
* Premium Rewards Audit Report (RBN063)

# **General Benefits and Cardinal Links**

[Cardinal HCM Support Guide](https://cardinalproject.virginia.gov/sites/default/files/2021-09/Cardinal_HCM_SupportGuide_Agencies.pdf)

[BN361: Benefit Enrollment and Maintenance](https://www.cardinalproject.virginia.gov/sites/default/files/2022-03/BN361%20Benefits%20Quick%20Reference%20Guide_0.pdf) – Quick Reference Guide

[Overview of the ESS Benefits Tile](https://youtu.be/4dG7sFkUs7M) – Video

[Overview of Open Enrollment](https://youtu.be/wirNEirWu2E) – Video

[BN362: Benefits Read-Only](https://cardinalproject.virginia.gov/WBTS/BN362%20Benefits%20Read-Only%20-%20Storyline%20output/story.html) – Copy of Instructor Led Training Presentation

[ESS How to View the Benefits Summary](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/ESS%20How%20to%20View%20the%20Benefits%20Summary.pdf) – Job Aid

[ESS How to View Benefit Statements](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/ESS%20How%20to%20View%20Benefit%20Statements.pdf) – Job Aid

[ESS How to Make Open Enrollment Elections](https://www.cardinalproject.virginia.gov/sites/default/files/2022-04/ESS_How%20to%20Make%20Open%20Enrollment%20Elections.pdf) – Job Aid

<https://www.cardinalproject.virginia.gov/job-aids> - When using this website, please pay attention to the modules and applications to avoid confusion.

