Title: Completing Benefits Open Enrollment Through Employee Self Service

PURPOSE

This procedure describes the steps required for entering benefit elections during open enrollment for employees using the Employee Self Services (ESS) Portal in Cardinal. This SOP is created in connection with Job Aid 1.0, Entering New Hire Benefits Enrollment Elections into Cardinal.

During the annual open enrollment period, ODU faculty and staff will be able to enroll in health benefits, add or remove dependents, or make changes to existing elections. The ESS portal in Cardinal will aid in ensuring the elections are made in a timely fashion.

* Please note once the open enrollment period is over, no elections, or changes can be made to the benefit plans unless there is a qualifying event. Please contact a member of the Department of Human Resources Benefits team at 757-683-3042 or visit the Benefits website: https://www.odu.edu/humanresources/benefits.

ACCESSING CARDINAL ESS

A. CARDINAL REGISTRATION

If you have not already registered in Cardinal, please follow the steps provided in the Cardinal Registration Quick Start Guide.

NOTE: You will need your Cardinal Employee ID and your ODU email address

B. LOG INTO ESS

After logging into the Cardinal platform, you will see the homepage screen. Enter your username (ODU email address) and password created during the registration process.
C. HOMEPAGE

From the homepage, you should see the “Benefits Detail” tile as shown in the red square. As you can see, the tile says, “Action Required,” which lets you know you are now able to make changes to your benefits. Click on this tile to take you to the “Benefits Detail” page.

D. BENEFITS DETAIL

On this page, you will see a summary of your current elections. You can utilize the scroll bar to scroll through your entire list of elections. From here, you will click on the “Benefits Enrollment” tab on the left side of your screen as shown in the red square.
E. BENEFITS ENROLLMENT

This page is where you will begin the process of electing benefits.

1. If you haven’t started the open enrollment process, you will see the “Start” button.
2. If you started the open enrollment process, but didn’t finish, or want to make updates before the close of the enrollment period you will see the “Restart” button.
3. Click either “Start” or “Restart” to enter your benefits elections.

F. ENROLLMENT SUMMARY

The enrollment summary page shows the benefits you have currently. During open enrollment, you will be able to select each tile to make changes to your benefits.

1. Click on the “Medical” tile to begin updating your medical elections.
   a. If you do not want to make changes, and are fine with the benefits you have, you can select the “Submit” button.

*Note you will need to enter your Flexible Spending election otherwise you will not have one for the upcoming benefits year.
2. On the medical page, you will be able to see the options you have as well as your eligible dependents.
   a. Ensure your dependents are showing accurately and select checkbox by each
      i. If dependents need to be added, click the “Add Dependent” button.
      ii. Notes for adding a dependent will be found in Appendix A.
   b. Select your health benefit option.
   c. Click the “Done” button to return to the Benefits Details page once you’ve made your selection.

   *Note: as you select your dependents, the coverage cost will update accordingly.

3. Once you’re back on the “Enrollment Summary” page, you should be able to see your medical election that was made, as well as the status showing as “Changed.”
   a. Click the “Flex Spending Medical” tile to make sure flex spending elections.
4. Click the “Select” button to enter your flex spending election.
   a. Enter your contribution amount in the “Annual Pledge” area.
   b. Click the “Done” button to return to the “Enrollment Summary” page.

*Note: Click the “Flexible Spending Account Worksheet if you need assistance to determine how much of a contribution would like to make.

5. Your flex spending election should now show.
   a. To elect “Flex Spending Dependent Care,” click on the tile and follow the same directions you used for electing flexible medical spending.
   b. If you elect either flex medical or dependent care, you must elect the “Flex Spending Admin Fee”. To do so, click on the tile.

6. Click the “Select” button to enroll into the admin fee
   a. Click the “Done” button to return to the “Enrollment Summary” page.
G. VALIDATING/FINALIZING

Now that you’ve elected your benefits, you can see the status reflects “Changed” in each tile, as well as showing what your cost per pay period will be under “Enrollment Summary”.

1. Click the “Submit” button to finalize your elections.

After clicking the “Submit” button you will see this Benefits Alerts message.

1. To view your Election Preview Statement, click “view”
2. If you are satisfied with your elections, click “Don”
3. Enter the employee ID (or name).
4. Click Search.

Your benefits elections have been selected and you’re open enrollment process is complete. You should receive an email with your open enrollment confirmation statement.
RECORDS RETENTION: TBA

CONTACTS: For questions regarding the this job aid, please contact the Employee Relations Manager at 757-683-3046 or Assistant Vice President for Human Resources at 757-683-4564.

Appendix A

(Adding a Dependent)

After clicking the “Add Dependent” button you will be taken to the “Dependent and Beneficiary Information” page.

1. Click the “Add Individual” button as shown in the red square

On the “Dependent/Beneficiary Information” page. You will click on the “Add Name” button as shown in the red square.
Enter your dependent’s name and click done.

Once you’re back on the “Dependent/Beneficiary Information” page. You will click add the additional information for your dependent as shown in the red square. After this is done you will click on “National ID” to add the social security number. Repeat the same steps for adding the social security number for entering the phone number.
After you have entered the social security and phone numbers, you will be taken back to the “Dependent/Beneficiary Information” page. Verify the information is correct and click the “Save” button. You will then see a pop up that says, “Saved Successfully.” Click the “OK” button.