

OLD DOMINION UNIVERSITY
DEPARTMENT OF HUMAN RESOURCES PROCEDURE MANUAL

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

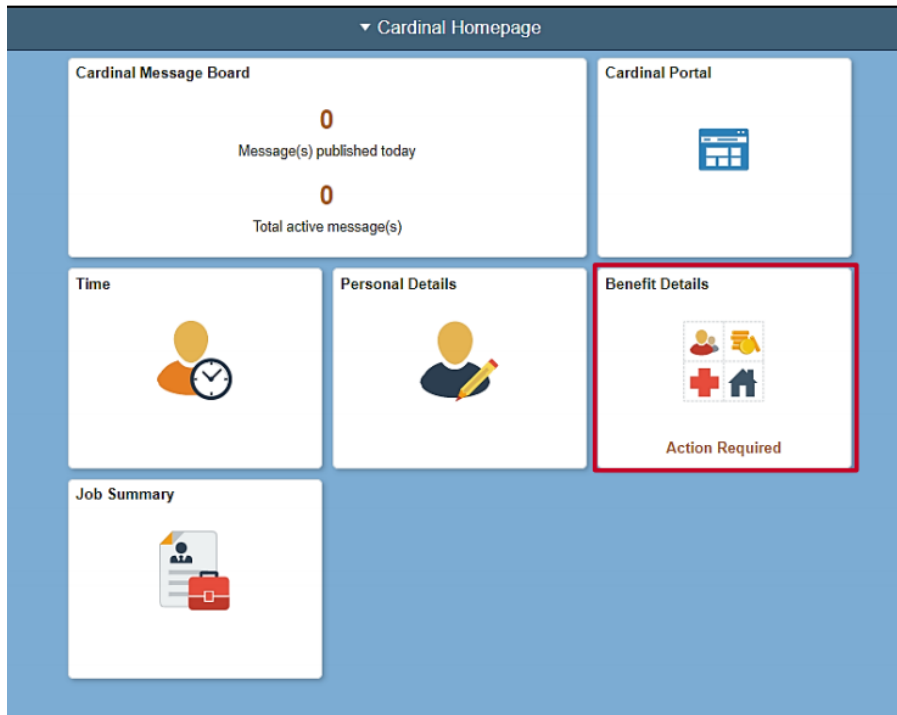
B. LOG INTO ESS

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.

A screenshot of the Cardinal Employee Self Service (ESS) login interface. At the top left is the Cardinal logo, which consists of a red stylized bird icon followed by the word "Cardinal" in red. Below the logo is a "Notice and Warning" section with small text. The main login area contains two input fields: the first is labeled "ODU Email Here" and the second is for a password, indicated by dots. Below these fields is a blue "Sign In" button. At the bottom, there are four links: "Forgot Username", "User Registration", "Forgot Password", and "Sign-on Help".

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.

Type of Benefit	Plan Description	Coverage or Participation
Medical	COVA Cr+Exp Den+Vision&Hmg	Single
Imputed Life	Imputed Life Insurance Income	Salary X 2
403(b)		Waived
Section 457		Waived
VRS Hyb Vol Defined Contr	Hybrid 0.00% VDC w/ER Match	Employer Funded
Flex Spending Medical	Medical Flex Spending Account	\$1,200 Pledge
Flex Spending Dependent Care		Waived
Employee Retirement DB	VRS Hyb Mand. Defined Benefit	4% of Earnings
Hybrid Retirement	Hybrid VRS DB Employer Match	0% of Earnings
Group Term Life	Group Term Life-Regular	0% of Earnings
Retiree Health Credit	Retiree Health Credit-Regular	0% of Earnings

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.

The screenshot shows the 'Benefit Details' page with a sidebar on the left containing links: Benefits Summary, Life Events, Dependent/Beneficiary Info, Benefits Enrollment (highlighted), and Benefit Statements. The main content area is titled 'Benefits Enrollment' and contains a table of 'Your Benefit Events'.

Event Description	Event Date	Event Status	Job Title	
Open Enrollment	07/01/2022	Open	Admin and Office Spec III	Start

This screenshot is similar to the previous one, but the 'Event Status' for the 'Open Enrollment' event is 'Submitted'. The button in the table is labeled 'Restart' and is highlighted with a red box, with a callout '2.' pointing to it.

Event Description	Event Date	Event Status	Job Title	
Open Enrollment	07/01/2022	Submitted	Admin and Office Spec III	Restart

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.

The screenshot shows the 'Benefits Enrollment' page with the 'Enrollment Summary' section expanded. It displays costs: Your Pay Period Cost \$220.00, Full Cost \$220.00, and Employer Cost \$929.50. The status is 'Pending Review'. There are buttons for 'Enrollment Preview Statement' and 'Submit Enrollment'. A callout 'a.' points to the 'Submit Enrollment' button. Below this, there are four 'Benefit Plans' tiles: 'Medical' (selected with callout '1.'), 'Flex Spending Medical', 'Flex Spending Dependent Care', and 'Flex Spending Admin Fee'. Each tile shows current and new election options and a 'Review' button.

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.

The screenshot shows the 'Medical' enrollment page. At the top, there are 'Cancel' and 'Done' buttons. Below is the 'Enroll Your Dependents' section, which includes a table of dependents. Callout 'a.' points to the 'Add Dependent' button. Callout 'i.' points to the checkbox for a dependent. Callout 'b.' points to the 'Enroll in Your Plan' section, which contains a table of plan options. Callout 'c.' points to the 'Done' button at the top right.

Plan Name	Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
Select Waive				\$0.00
Select COVA Hltb/Awr + Prev Den	\$26.50		\$928.00	\$26.50
Select COVA Hltb/Awr + Exp Den&Vis	\$69.50		\$928.00	\$69.50
Select COVA Hltb/Awr + Exp Den	\$84.50		\$928.00	\$84.50
Select COVA High Ded Plan + Prev Den			\$818.50	\$0.00
Select COVA High Ded Plan + Exp Den	\$44.50		\$818.50	\$44.50
Select COVA Care + Prev Dental	\$147.50		\$929.50	\$147.50
Select COVACr+Prev Den+Out-of-ntak	\$173.00		\$929.50	\$173.00
Select COVA Care + Expanded Dental	\$193.50		\$929.50	\$193.50
Select COVA Cr+Exp Den+Out-of-ntak	\$219.00		\$929.50	\$219.00
Select COVA Cr+Exp Den+Vision&Hmg	\$220.00		\$929.50	\$220.00
Select COVA+ExDen+Out-of-ntak+Vis&Hr	\$245.00		\$929.50	\$245.00

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.

The screenshot shows the 'Enrollment Summary' page. At the top, it displays 'Your Pay Period Cost \$193.50' and 'Full Cost \$193.50'. Below this, there are buttons for 'Enrollment Preview Statement' and 'Submit Enrollment'. A callout 'a.' points to the 'Flex Spending Medical' tile, which shows 'Current Medical Flex Spending Account' and 'Status Pending Review'.

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.

4.

a.

b.

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

5.

a.

b.

6. Click the “Select” button to enroll into the admin fee
 - a. Click the “Done” button to return to the “Enrollment Summary” page.

6.

a.

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.

Benefits Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$222.69**
Status Pending Review
Enrollment Preview Statement
Submit Enrollment 1.

Full Cost \$222.69
Employer Cost \$929.50

FSA Fee
FSA De...
Medical

Benefit Plans

Medical
Current COVA Cr+Exp Dan+Vision&Hrng
New COVA Care + Expanded Dental
Status **Changed**
4 Dependents
Pay Period Cost **\$193.50**
Review

Flex Spending Medical
Current Medical Flex Spending Account
New Medical Flex Spending Account \$250
Status **Changed**
Pay Period Cost **\$10.42**
Review

Flex Spending Dependent Care
Current Waive
New Dependent Care FSA \$400
Status **Changed**
Pay Period Cost **\$16.67**
Review

Flex Spending Admin Fee
Current Flex Spending Admin Fee
New Flex Spending Admin Fee
Status **Changed**
Pay Period Cost **\$2.10**
Review

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.

Benefits Alerts

Done 2 **View** 1

Your benefit choices have been successfully submitted to the Benefits Department.

Select View to review your Election Preview statement, Done to return to the Benefits Enrollment Summary

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

Dependent and Beneficiary Information			
Name	Relationship	Beneficiary	Dependent
Summer Wilb450	Spouse		✓
Bryce Wilb450	Child		✓
Jessica Wilb450	Child		✓

On the “Dependent/Beneficiary Information” page. You will click on the “Add Name” button as shown in the red square.

Cancel

Individual Dependent/Beneficiary Information

Name

Add Name

Personal Information

Date of Birth

*Gender

*Relationship to Employee

*Marital Status

*Student

*Disabled

*Smoker

As of

As of

As of

As of

Address

Address	Address Type	Same as mine
100 East Main Street Richmond, VA 23234	Home	Same as mine

National ID

No data exists

Add National ID

Phone

No data exists

Add Phone

Enter your dependent's name and click done.

A screenshot of a web form titled "Name". At the top, there are "Cancel" and "Done" buttons. The form contains several fields: "Name Format" (a dropdown menu with "English" selected), "Name Prefix" (a dropdown menu), "*First Name" (a text input field with a red border), "Middle Name" (a text input field), "*Last Name" (a text input field with a red border), "Name Suffix" (a dropdown menu), "Display Name" (a text input field), "Formal Name" (a text input field), and "Name" (a text input field).

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.

A screenshot of a web form titled "Individual Dependent/Beneficiary Information". At the top, there are "Cancel" and "Done" buttons. Below the title, there is a "Name" section with a text input field containing "Yellow Wills". Below that is a "Personal Information" section. This section contains a red-bordered box around the following fields: "Date of Birth" (a date picker), "*Gender" (a dropdown menu), "*Relationship to Employee" (a dropdown menu), "*Marital Status" (a dropdown menu with "Single" selected), "*Student" (a dropdown menu with "No" selected), "*Disabled" (a dropdown menu with "No" selected), and "*Smoker" (a dropdown menu with "Non Smoker" selected). To the right of these fields are four "As of" date picker fields. Below the "Personal Information" section is an "Address" section with a table. The table has three columns: "Address", "Address Type", and "Same as mine". The first row contains the address "100 East Main Street, Richmond, VA 23234", the address type "Home", and the "Same as mine" checkbox. Below the "Address" section is a "National ID" section with a "No data exists" message and an "Add National ID" button. Below that is a "Phone" section with a "No data exists" message and an "Add Phone" button. At the bottom is an "Email" section.

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.

Cancel

Individual Dependent/Beneficiary Information

Save

Select Save after you have edited your Dependent/Beneficiary's information.

Name

Yellow Wills

Personal Information

Date of Birth03/01/2022

*GenderFemale

*Relationship to EmployeeChild

*Marital StatusSingle

*StudentNo

*DisabledNo

*SmokerNon Smoker

As of

As of

As of

As of

Saved Successfully

OK

Address

Address	Address Type	Same as mine
100 East Main Street Richmond, VA 23234	Home	Same as mine