Introduction

This guide is designed to assist state and California State University employers with the recurring Dependent Eligibility Verification process.

On June 15, 2019, my|CalPERS was enhanced to streamline processing health enrollment transactions. Some noticeable changes are fewer processing pages, added Return links to go to the previous pages, transaction confirmation with a link to print transaction details, and a nonbinary gender.

Recurring dependent verification is required for the following:

Spouses, registered domestic partners, natural born children, adopted children, step-children, and children of registered domestic partners

Note: Parent-child relationship or overage disabled dependents have their own recertification process. Refer to the State Health Benefits Guide (PDF) for more information.

Pathway: CalPERS website > Employers > Policies & Procedures> Reference & Health Guides >State Health Benefits Guide

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

Training Opportunities

Prior to taking a my|CalPERS System Training instructor-led class, new users should review the Introduction to my|CalPERS for Business Partners (PDF) guide and have attended a State Health Business Rules training class.

Business Rules

This student guide contains no health business rules. Attend a state health business rules training class or review business rules online classes for the simplified explanation of laws defined by the California Public Employees’ Retirement Law (PERL).

Contents

Unit 1: Dependent Eligibility Verification Health Event Reason ..................................................... 2
Unit 2: Dependent Eligibility Verification Processing ..................................................................... 3
Unit 3: Reports ................................................................................................................................ 8
CalPERS Resources ........................................................................................................................ 10
CalPERS Contacts .......................................................................................................................... 11
Unit 1: Dependent Eligibility Verification Health Event Reasons

In this unit, you will learn about the four health event reasons in my|CalPERS to facilitate the Dependent Eligibility Verification process.

**Verification of Dependent**

This reason can be used when all documentation has been received before the cancellation date and the dependent is verified.

- **Health Event Type**: Verify Dependent
- **Health Event Reason**: Verification of Dependent

**Did Not Verify-Batch**

This reason is an automated deletion. Any “batch” transaction is one that has automatically updated in my|CalPERS.

- **Health Event Type**: Delete Dependent
- **Health Event Reason**: Did not Verify – Batch

**Did Not Verify-Online**

This reason can be used to delete dependents that were not verified during the recertification process. You can choose to allow the system to automatically delete the dependent rather than process this transaction.

- **Health Event Type**: Delete Dependent
- **Health Event Reason**: Did not Verify – Online

**Re-Enrollment of Verified Dependent**

This reason can be used to re-enroll a dependent after a batch or online Delete Dependent – Did Not Verify event has been processed.

- **Health Event Type**: Add Dependent
- **Health Event Reason**: Re-Enrollment of Verified Dependent
Unit 2: Dependent Eligibility Verification Processing

In this unit, you will learn how to verify, add, and delete a dependent associated with the Dependent Eligibility Verification process.

- **90 Days Prior to the 1st of the Employee’s Birth Month**
  - Employee will receive notice from CalPERS
  - Verification period begins

- **1st of the Employee’s Birth Month**
  - Verification documents are due to human resources
  - Keep all supporting documentation on file at your agency
  - If a dependent does not qualify, you may delete the dependent from the employee’s health benefits or wait for the deletion batch

- **After Verification Due Date**
  - A deletion batch will automatically remove all dependents that were not verified by the 1st of the month following the employee’s birthday
  - You may add a deleted dependent to the employee’s health benefits if you verified the dependent after the verification due date. The effective date will be future dated.

**Contents**

Unit 1: Verify Dependent ................................................................................................................................. 4
Unit 2: Add Dependent ................................................................................................................................. 5
Unit 3: Delete Dependent ............................................................................................................................. 6
**Scenario 1: Verify Dependent**

**System Logic**
- From the Search for Dependents Requiring Verification section (step 4), there are three verification reports that can be accessed. See Unit 3: Reports for more information.

**Step Actions**

Step 1  Select the **Reporting** global navigation tab.

Step 2  Within the Create or Edit Report section, select **Verify Dependents** from the **Method** drop-down list.

Step 3  Select the **Continue** button.

Step 4  Within the Search for Dependents Requiring Verification section, you may search by selecting the **Search by Verification End Date** or **Search by Subscriber** radio button.

Step 5  Complete the Search for Dependents Reporting Verification section.

Step 6  Select the **Verify** checkbox(es) for the appropriate dependent(s).

Step 7  Select the **Confirm** button at the bottom left.

You have completed this scenario.
**Scenario 2: Add Dependent**

**Step Actions**

### Add Health Enrollment Transaction

**Step 1**  
Select the **Reporting** global navigation tab.

**Step 2**  
Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

![Image](https://example.com/image1.png)

**Step 3**  
Select the **Continue** button.

### Search for the Subscriber

**Step 4**  
Complete the Person Search section.

![Image](https://example.com/image2.png)

**Step 5**  
Select the **Search** button.

### Input Health Event Information

**Step 6**  
Complete the Health Event Information section.

![Image](https://example.com/image3.png)

**Step 7**  
Use the **View Effective Date** button at bottom right to view the effective date.

**Step 8**  
Select the **Save & Continue** button.

**Step 9**  
Select the checkbox next to the dependent’s name who is being added.

**Step 10**  
Select the **Continue** button.

A transaction confirmation displays, and you have completed this scenario.
**Scenario 3: Delete Dependent**

**System Logic**
- If you process the delete dependent transaction, the effective date will be the first of the month following the event date.
- If you allow the system to automatically process the delete dependent batch, the effective date will be deleted the first of the month following the employee’s birthday.

**Step Actions**

**Add Health Enrollment Transaction**

**Step 1** Select the **Reporting** global navigation tab.

**Step 2** Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

**Step 3** Select the **Continue** button.

**Search for the Subscriber**

**Step 4** Complete the Person Search section.

**Step 5** Select the **Search** button.

**Input Health Event Information**

**Step 6** Complete the Health Event Information section.

**Step 7** Use the **View Effective Date** button at bottom right to view the effective date.

**Step 8** Select the **Save & Continue** button.
Delete Dependent(s)

Step 9  Select the checkbox next to the dependent name who is being deleted for the health event reason.

<table>
<thead>
<tr>
<th>Existing Relationships Eligible for Health Event</th>
<th>Date of Birth</th>
<th>Relationship</th>
<th>Medical</th>
<th>Dental</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMITH, SAM</td>
<td>03/07/1996</td>
<td>Child</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>SMITH, SALLY</td>
<td>10/07/1999</td>
<td>Child</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>SMITH, SUSAN</td>
<td>07/14/1967</td>
<td>Spouse</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Step 10  Select the **Continue** button.

Step 11  Select one of the four options in the health transaction confirmation:

- **Health Transaction Confirmation**
  - The transaction successfully processed.
  - Print the health transaction confirmation.
  - Add another transaction for this subscriber.
  - Process a new transaction for a different subscriber.
  - Return to home page.

You have completed this scenario.
Unit 3: Reports

my|CalPERS generates reports using IBM Cognos software. Cognos queries your agency’s data in my|CalPERS and generates reports in multiple formats using the criteria that you choose.

The my|CalPERS Employer Reports (Cognos) page provides a listing of reports, an example and description of each, the user role needed to generate, and the status (available or unavailable) of each report. Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos)

For information on how to navigate through Cognos and learn its functionality, review the my|CalPERS Employer Reports (Cognos) (PDF) student guide on the CalPERS website.

Pathway: CalPERS website > Employers > I Want To….Find my|CalPERS Student Guides

Step Actions

Access the Verification Reports

Step 1 Select the Reporting global navigation tab.

Step 2 Within the Create or Edit Report section, select Verify Dependents from the Method drop-down list.

Step 3 Select the Continue button.

Step 4 Within the Search for Dependents Requiring Verification section, select a report link in the upper right.
Dependent Verification End Date Employer Report
This report lists dependent(s) by the selected verification end date.

<table>
<thead>
<tr>
<th>Subscriber CalPERS ID</th>
<th>Subscriber Last Name</th>
<th>Subscriber First Name</th>
<th>Dependent CalPERS ID</th>
<th>Relationship Type</th>
<th>Dependent Last Name</th>
<th>Dependent First Name</th>
<th>Verification End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0123456789</td>
<td>WALL</td>
<td>WANDA</td>
<td>1234567890</td>
<td>Spouse</td>
<td>WALL</td>
<td>WALLY</td>
<td>05/31/2019</td>
</tr>
</tbody>
</table>

Dependent Verification Health Event Employer Report
This report lists dependent(s) that have been deleted with the Delete Dependent – Did Not Verify health event and/or a list of dependents that were verified with the Verify Dependent – Verification of Dependent health event.

<table>
<thead>
<tr>
<th>Subscriber CalPERS ID</th>
<th>Subscriber Last Name</th>
<th>Subscriber First Name</th>
<th>Dependent CalPERS ID</th>
<th>Relationship Type</th>
<th>Dependent Last Name</th>
<th>Dependent First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0123456789</td>
<td>JONES</td>
<td>JOHN</td>
<td>1234567890</td>
<td>Spouse</td>
<td>JONES</td>
<td>JUDI</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Health Event Type</th>
<th>Health Event Reason</th>
<th>Health Event Effective Date</th>
<th>Verification End Date</th>
<th>Health Event Create Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verify Dependent</td>
<td>Verification of Dependent</td>
<td>08/01/2018</td>
<td>07/31/2021</td>
<td>07/09/2018</td>
</tr>
</tbody>
</table>

Dependent Verification Dependents with Past Due or No End Dates Active Health Report
This report lists dependents that remain enrolled despite their certification being either past due or missing.

<table>
<thead>
<tr>
<th>Report Run Date</th>
<th>Member Program</th>
<th>Subscriber CalPERS ID</th>
<th>Subscriber Last Name</th>
<th>Subscriber First Name</th>
<th>Dependent CalPERS ID</th>
<th>Relationship Type</th>
<th>Dependent Last Name</th>
<th>Dependent First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/16/2019</td>
<td>State Active</td>
<td>0123456789</td>
<td>SMITH</td>
<td>SAM</td>
<td>1234567890</td>
<td>CHILD</td>
<td>SMITH</td>
<td>SONNY</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Verification End Date</th>
<th>Workflow Created</th>
<th>Workflow State</th>
<th>Workflow Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/28/2019</td>
<td>NO</td>
<td>Unassigned</td>
<td></td>
</tr>
</tbody>
</table>

Workflow is used by CalPERS
CalPERS Resources

Introduction
Obtain more information by visiting the CalPERS website at www.calpers.ca.gov.

Resources Links

- **my|CalPERS Student Guides**
  Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides

- **Employer Education Schedule (PDF)**
  Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides > Employer Education Schedule

- **Online Classes for Employers (PDF)**
  Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides > Online Classes for Employers

- **my|CalPERS Health Aid (PDF)** Health Event Types and Reasons for Employers
  Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides > scroll down to the Supplemental Materials section

- **Frequently Asked Questions (FAQ)**
  Pathway: CalPERS website > About > Resources: Frequently Asked Questions

- **Policies & Procedures**
  Pathway: CalPERS website > Employers > Policies & Procedures

- **my|CalPERS Technical Requirements**
  Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements

- **CalPERS State Health Benefits Guide (PDF)**
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Health Benefits Guide

- **Health Program Guide (HBD-120) (PDF)**
  Pathway: CalPERS website > In the Search box at top right, enter “HBD-120” > select Health Program Guide link

- **Circular Letters**
  Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters

- **California Public Employees' Retirement Law (PERL)**
  Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees’ Retirement Law (PERL)
CalPERS Contacts

Contact CalPERS via Email

- To contact the employer educators for training questions and requests, email CalPERS_Employer_Communications@CalPERS.CA.GOV
- To contact the Employer Response Team for assistance with your most critical, complex, or time-sensitive issues, email ERT@CalPERS.CA.GOV

Contact CalPERS by Phone or Fax

You can reach CalPERS at 888 CalPERS (or 888-225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the Common Tasks left-side navigation folder, and select the Submit Inquiry link to submit a question or request.