

myCalPERS Health Dependent Eligibility Verification

Student Guide

December 19, 2025



Introduction

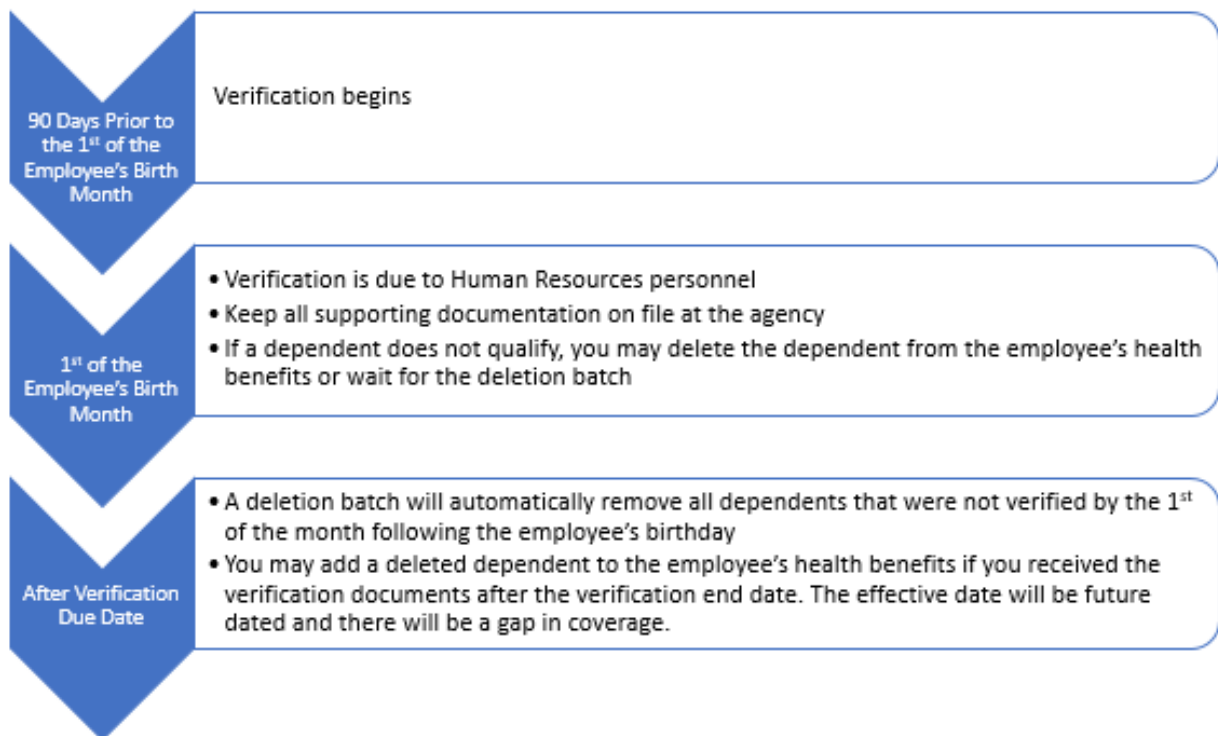
This guide is designed to assist state and California State University employers with the required recurring Dependent Eligibility Verification process for the following dependents:

Spouses, registered domestic partners, natural born children, adopted children, stepchildren, and children of registered domestic partners.

Note: Parent-child relationships and overage disabled dependents have their own recertification process. Refer to the [State Health Benefits Guide \(PDF\)](#) for more information.

Employee Notification Timeline

- 90 days prior to the 1st of the employee's birth month (or 120 days before the verification end date), the employee will receive the initial notice
- 60 days prior to the 1st of the employee's birth month (or 90 days before the verification end date), the employee will receive the reminder notice
- 30 days prior to the 1st of the employee's birth month (or 60 days before the verification end date), the employee will receive the deletion notice



Disclaimer

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

System Access

If you are unable to process these scenarios, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide and take a Business Rules class. Business rules summarizes the laws defined by the California Public Employees' Retirement Law (PERL).

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Unit 1: 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. Four health event reasons are used in this 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 when the dependent is not verified by the deadline. Any batch transaction is one that has automatically updated in myCalPERS.

- **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 allow the system to delete the dependent automatically rather than process this transaction.

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

Re-Enrollment of Verified Dependent

This reason should be used if a:

- Dependent was deleted with the Delete Dependent – Did Not Verify reason and
- Verification without lapse is needed due to receiving documents timely

This will update myCalPERS with the correct dependent verification end date, so that the dependent will be included in the next verification cycle, if applicable.

- **Health Event Type:** Add Dependent
- **Health Event Reason:** Re-Enrollment of Verified Dependent

Note: Do not rescind the Delete Dependent – Did Not Verify transaction; otherwise, erroneous verification end dates will display for dependents.

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Scenario 1: Verify Dependent

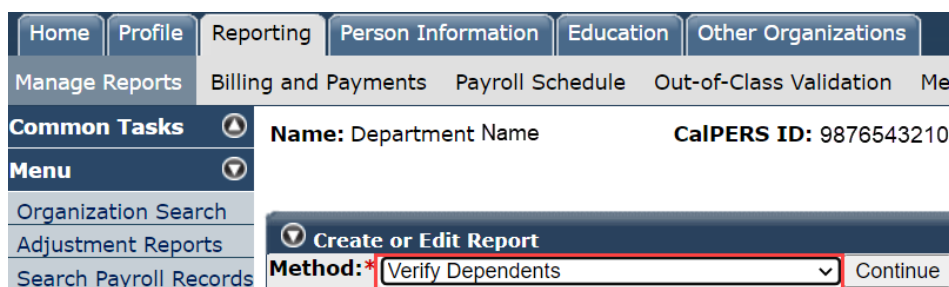
System Logic

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

Step Actions (7 Steps)

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.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Me

Common Tasks

Menu

Organization Search

Adjustment Reports

Search Payroll Records

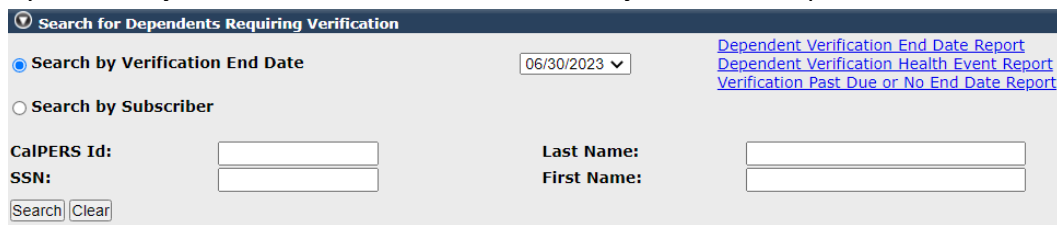
Name: Department Name CalPERS ID: 9876543210

Create or Edit Report

Method: * Verify Dependents Continue

Step 3 Select the **Continue** button.

Step 4 Within the Search for Dependents Requiring Verification section, you may filter by **Search by Verification End Date** or **Search by Subscriber** options.



Search for Dependents Requiring Verification

☒ Search by Verification End Date 06/30/2023

☐ Search by Subscriber

CalPERS Id: SSN: Last Name: First Name:

Search Clear

[Dependent Verification End Date Report](#)

[Dependent Verification Health Event Report](#)

[Verification Past Due or No End Date Report](#)

Step 5 Complete the Search for Dependents Reporting Verification section.

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



Subscriber Last Name	Subscriber First Name	Subscriber CalPERS ID	Dependent Name	Dependent Date of Birth	Relationship Type	Verification End Date	Verify
WALL	WANDA	0123456789	WILLIE WALL	01/04/2012	Child	04/30/2018	<input type="checkbox"/>

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

You have completed this scenario.

Scenario 2: Add Dependent

Step Actions (10 Steps)

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.

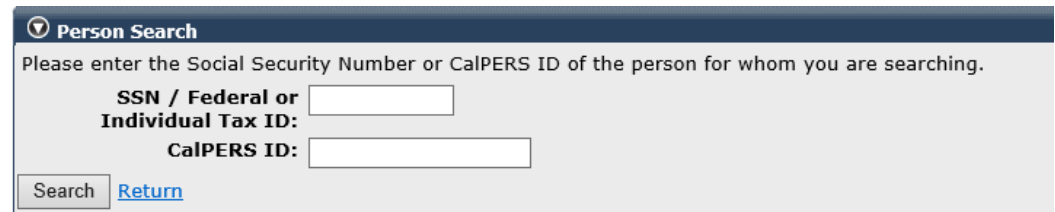


The screenshot shows a web application interface with a top navigation bar containing tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this is a secondary navigation bar with links: Manage Reports, Billing and Payments, Payroll Schedule, Member Requests, and Health. A 'Common Tasks' menu is open, showing options: Organization Search and Adjustment Reports. To the right, there is a form section with 'Name: Department Name' and 'CalPERS ID: 9876543210'. Below this is a 'Create or Edit Report' section with a 'Method:' dropdown menu. The dropdown is open, showing 'Add or Edit Health Enrollment' as the selected option, highlighted with a red box. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

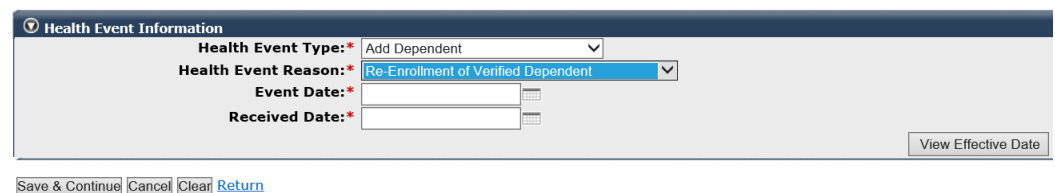


The screenshot shows a 'Person Search' section with a dark blue header. Below the header, it says 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located to the left of the 'CalPERS ID' field, and a 'Return' link is to its right.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows a 'Health Event Information' section with a dark blue header. Below the header, there are four fields: 'Health Event Type:' with a dropdown menu showing 'Add Dependent'; 'Health Event Reason:' with a dropdown menu showing 'Re-Enrollment of Verified Dependent'; 'Event Date:' with a date input field; and 'Received Date:' with a date input field. A 'View Effective Date' button is located to the right of the 'Received Date' field. At the bottom, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

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

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

Step 9 Select the check box next to the dependent's name who is being added.

Step 10 Select the **Continue** button.

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 the first of the month following the employee's birthday.

Step Actions (11 Steps)

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.

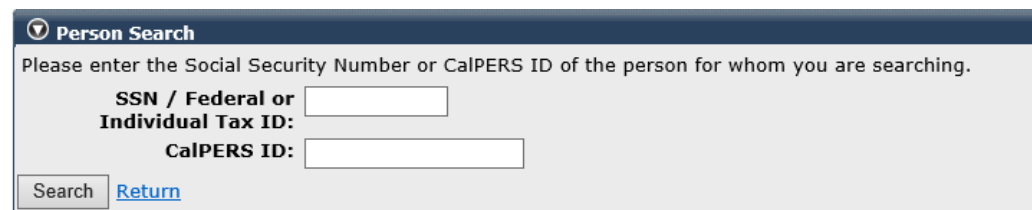


The screenshot shows the 'Reporting' tab selected in the top navigation bar. Below it, the 'Create or Edit Report' section is visible. The 'Method' dropdown menu is open, and 'Add or Edit Health Enrollment' is selected. The 'Continue' button is visible next to the dropdown.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

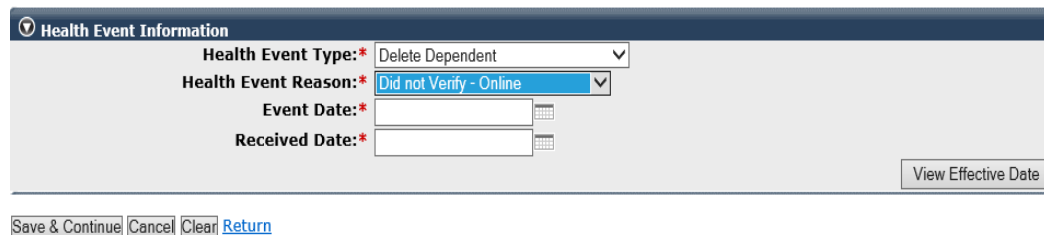


The screenshot shows the 'Person Search' section. It contains a text box for 'SSN / Federal or Individual Tax ID' and a text box for 'CalPERS ID'. There is a 'Search' button and a 'Return' link.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' section. It contains a dropdown for 'Health Event Type' (set to 'Delete Dependent'), a dropdown for 'Health Event Reason' (set to 'Did not Verify - Online'), and input fields for 'Event Date' and 'Received Date'. There is a 'View Effective Date' button and a 'Save & Continue' button.

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

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

Delete Dependent(s)

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

Existing Relationships Eligible for Health					
	Name	Date of Birth	Relationship	Medical	Dental
<input type="checkbox"/>	SMITH, SAM	03/07/1996	Child	Yes	No
<input type="checkbox"/>	SMITH, SALLY	10/07/1999	Child	Yes	No
<input type="checkbox"/>	SMITH, SUSAN	07/14/1967	Spouse	Yes	No

[Continue](#) [Cancel](#) [Return](#)

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 2: Reports

myCalPERS generates reports using IBM Cognos software. Cognos queries your agency's data in myCalPERS and generates reports in multiple formats using the criteria that you choose.

The [myCalPERS Employer Reports \(Cognos\) Catalog](#) provides a list of reports, an example and description of each, the user role needed to generate, and the status (available or unavailable) of each report.

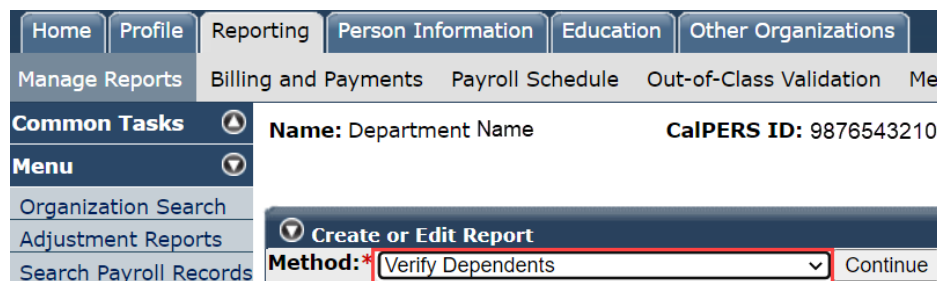
For information on how to navigate through Cognos and learn its functionality, review the [myCalPERS Employer Reports \(Cognos\) \(PDF\)](#) student guide on the CalPERS website.

Step Actions (4 steps)

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.



The screenshot shows the myCalPERS Reporting section. The 'Reporting' tab is selected in the top navigation bar. Below it, the 'Create or Edit Report' section is visible. The 'Method' dropdown menu is open, and 'Verify Dependents' is selected. The 'Continue' button is visible next to the dropdown.

Step 3 Select the **Continue** button.

Step 4 Within the Search for Dependents Requiring Verification section, select a **report** link in the upper right.



The screenshot shows the 'Search for Dependents Requiring Verification' section. The 'Search by Verification End Date' option is selected, and the date '05/31/2019' is entered. The 'Search' button is visible. In the upper right corner, there are three report links: 'Dependent Verification End Date Report', 'Dependent Verification Health Event Report', and 'Verification Past Due or No End Date Report'.

Refer to the following page for the report descriptions.

Report Descriptions

Dependent Verification End Date Employer Report

This report lists dependent(s) by the selected verification end date.

Business Partner CalPERS ID: Department Name
Verification End Date based on Verification Calendar: 05/31/2019
Verification End Date entered by the user:

Subscriber CalPERS ID	Subscriber Last Name	Subscriber First Name	Dependent CalPERS ID	Relationship Type	Dependent Last Name	Dependent First Name	Verification End Date
0123456789	WALL	WANDA	1234567890	Spouse	WALL	WALLY	05/31/2019

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. **Yes** or **No** in the last column indicates the dependent was or wasn't enrolled in medical as of the date the report ran.

Business Partner CalPERS ID: Dept. Name 9876543210
Health Event Transaction: Verify Dependent - Verification of Dependent

Health Effective Date Range:

Health Event Create Date
Range:

Subscriber CalPERS ID	Subscriber Last Name	Subscriber First Name	Dependent CalPERS ID	Relationship Type	Dependent Last Name	Dependent First Name
0123456789	JONES	JOHN	1234567890	Child	JONES	JENNI

Health Event Type	Health Event Reason	Health Event Effective Date	Verification End Date	Health Event Create Date	Dependent Enrolled as of Report Date
Verify Dependent	Verification of Dependent	08/01/2018	11/30/2030	08/09/2018	Yes

Dependent Verification 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.

Report Run Date : 04/26/2019

Member Program	Subscriber CalPERS ID	Subscriber Last Name	Subscriber First Name	Dependent CalPERS ID	Relationship Type	Dependent Last Name	Dependent First Name
State Active	0123456789	SMITH	SAM	1234567890	CHILD	SMITH	SONNY

Verification End Date	Workflow Created	Workflow State	Workflow Assignment
02/28/2019	NO		Unassigned

(Workflow is used by CalPERS)

You have completed this unit.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > (On the bottom right) Employer Education > Business Rules & myCalPERS Classes
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > (On the right side under Resources) myCalPERS Student Guides & Resources
- [Policies & Procedures](#)
Pathway: CalPERS website > Employers > Policies & Procedures
- [State Health Benefits Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Health Benefits Guide (PDF)
- [Health Program Guide \(HBD-120\) \(PDF\) \(Member publication\)](#)
Pathway: CalPERS website > In the search box at top right, enter HBD-120 > CalPERS Health Program Guide
- [System Enhancements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Enhancements
- [Circular Letters](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog
 - Run in Cognos
 - CalPERS Health Subscriber Out of Service Population – Employer
 - Chancellor's Office Parent – Child Recertification Report CSU Campuses
 - Dental Retirees OE Report – CalHR
 - Dental Retirees OE Report – CSU
 - Dependent Enrollment Report
 - Employer Health Enrollee Report – Ext
 - Employer Health Event Notification Report
 - Employer Health Event Transaction Report (**Note:** The 26-year-old deletion batch runs the first business day of the month for the following month's deletions.)

- Health Plan Statement Employer Report
- Health ZIP Code Yes-No Report - State/CSU
- Parent-Child Relationship Dependent with Expiring Certification Report
- State Active Health Enrollment and SCO Health Deduction Discrepancy Report
- Run via the myCalPERS pages (not the **Reports** left-side link):
 - For state agencies:
 - Dependent Verification End Date Employer Report
 - Dependent Verification Health Event Employer Report
 - Dependent Verification with Past Due or No End Dates Active Health Report
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab)
 - Business Rules
 - Health Plan Options
 - Health Benefits Officer Roles & Responsibilities
 - Health Eligibility Requirements
 - Health Enrollment
 - myCalPERS
 - New Enrollment
 - Change Plan
 - Cancellation
 - Rescission
 - Add a Dependent
 - Delete Dependent
 - COBRA Enrollment for Deleted Dependents
 - COBRA Enrollment for Employees
 - Set Up Direct Pay
 - Reconcile State-Active Premiums (central-state agencies)

CalPERS Contacts

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**.
- To [request a custom Cognos health report](#), email **hamd_data_services@calpers.ca.gov**. It can take 6-10 weeks to fulfill each request. Additional information and approval may be required.

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, then select the **Submit Inquiry** link to submit a question or request.