

myCalPERS Health Dependent Eligibility Verification

Student Guide

April 3, 2026



Introduction

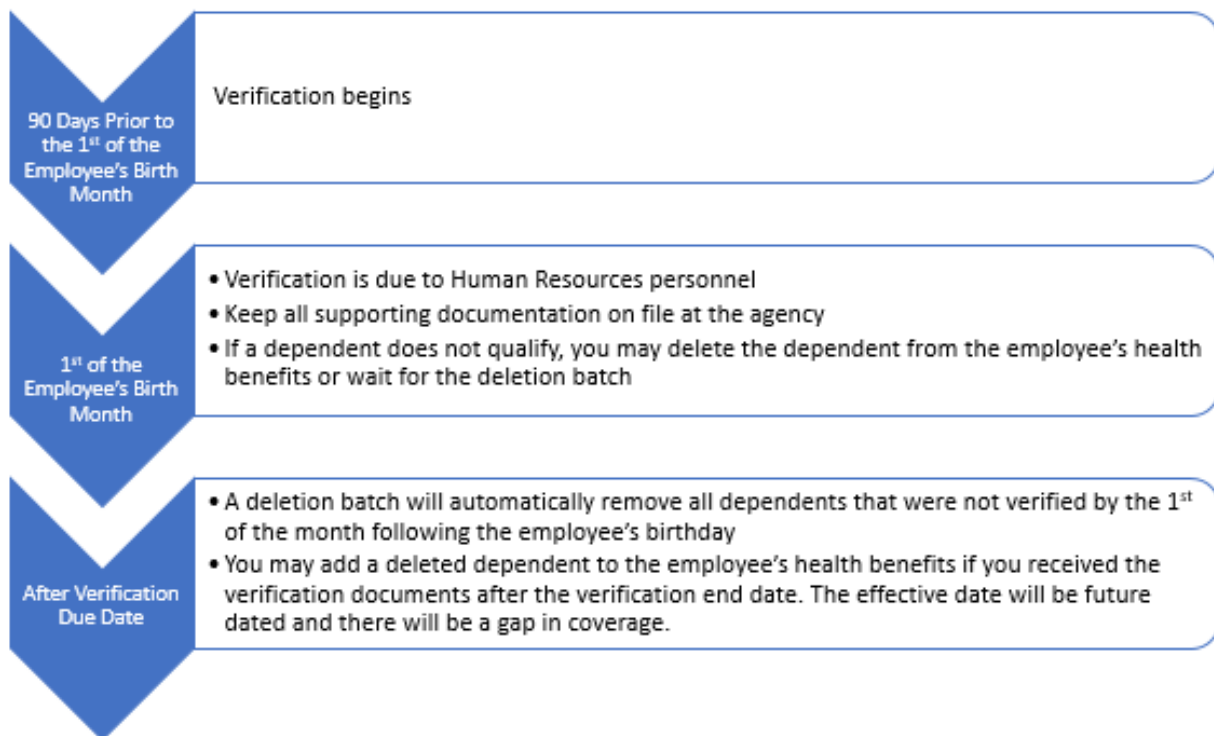
This guide is designed to assist state and California State University employers with the required recurring Dependent Eligibility Verification process for the following dependents:

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

- Business partner and participant information has been masked in this procedure guide.
- We strive to provide accurate information within this guide; however, the Public Employees' Retirement Law is the authoritative source for CalPERS policies.

System Access

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

Training Opportunities

To access our [instructor-led training schedule](#) and our [self-paced online classes](#), log in to your [myCalPERS](#) business partner account, and then select the **Education** global navigation tab.

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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

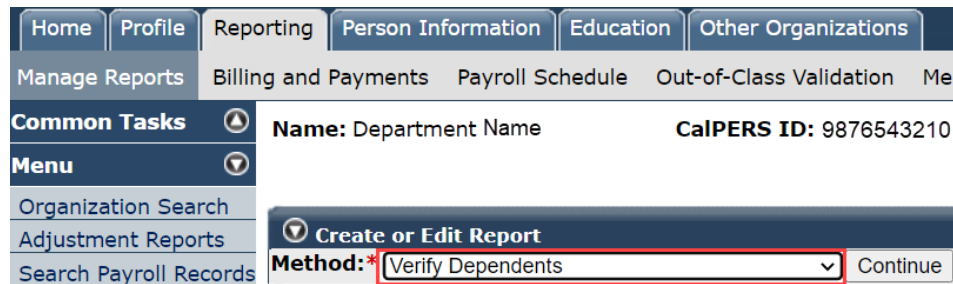
System Logic

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 Name: Department Name CalPERS ID: 9876543210

Menu

Organization Search

Adjustment Reports

Search Payroll Records

Create or Edit Report

Method: 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

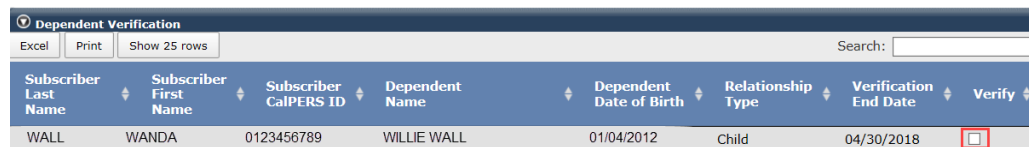
CalPERS Id: Last Name:

SSN: First Name:

[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.

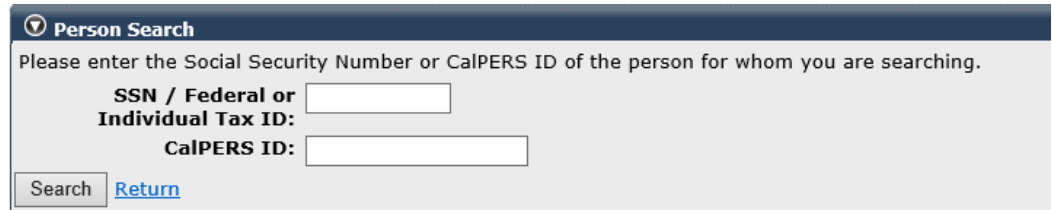


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Under the Reporting tab, there are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, Member Requests, and Health. A 'Common Tasks' section is expanded to show a 'Menu' with options for Organization Search and Adjustment Reports. Below the menu, there is a 'Create or Edit Report' section with a 'Method' dropdown menu set to 'Add or Edit Health Enrollment' and a 'Continue' button. The page also displays 'Name: Department Name' and 'CalPERS ID: 9876543210'.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

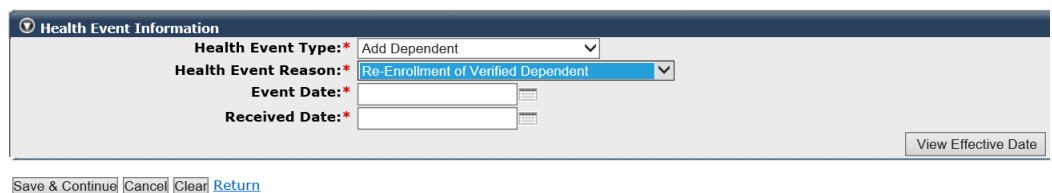


The screenshot shows the 'Person Search' form with the instruction: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button and a 'Return' link are at the bottom.

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' form. It has four fields: 'Health Event Type:*' (dropdown menu set to 'Add Dependent'), 'Health Event Reason:*' (dropdown menu set to 'Re-Enrollment of Verified Dependent'), 'Event Date:*' (calendar icon), and 'Received Date:*' (calendar icon). A 'View Effective Date' button is at the bottom right. At the bottom left, 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.

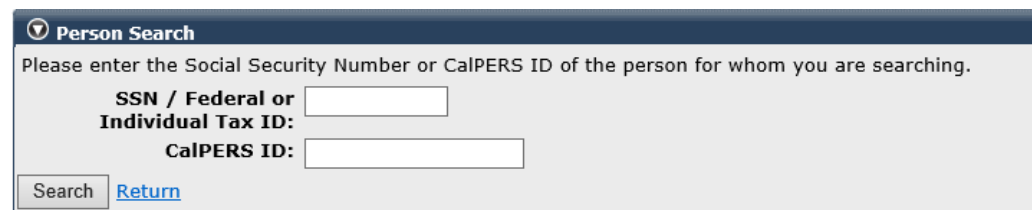


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Under the Reporting tab, there are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, Member Requests, and Health. A 'Common Tasks' section is expanded to show a 'Menu' with options: Organization Search, Adjustment Reports, and 'Create or Edit Report'. The 'Create or Edit Report' section is active, showing a 'Method' dropdown menu with 'Add or Edit Health Enrollment' selected and highlighted with a red box. A 'Continue' button is visible to the right.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.



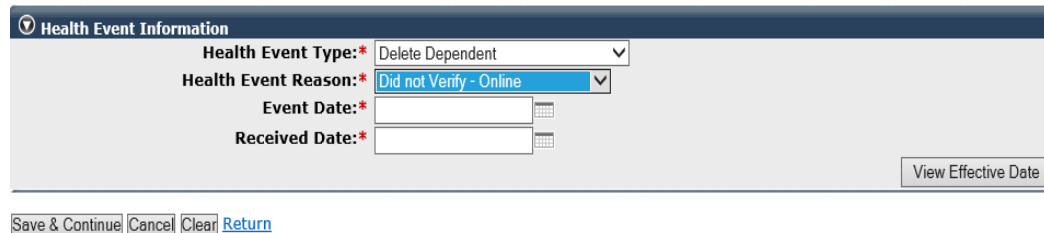
The screenshot shows the 'Person Search' form. It contains the following fields and controls:

- Header: Person Search
- Text: Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.
- SSN / Federal or Individual Tax ID: [Text Input Field]
- CalPERS ID: [Text Input Field]
- Buttons: Search, Return

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' form. It contains the following fields and controls:

- Header: Health Event Information
- Health Event Type: [Dropdown Menu] (Selected: Delete Dependent)
- Health Event Reason: [Dropdown Menu] (Selected: Did not Verify - Online)
- Event Date: [Date Picker]
- Received Date: [Date Picker]
- Buttons: Save & Continue, Cancel, Clear, Return, View Effective Date

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

The [myCalPERS Reports 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.

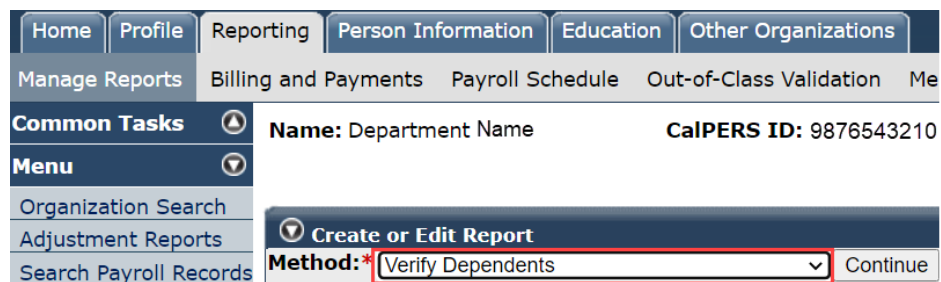
For reports information on how to navigate and learn its functionality, review the [myCalPERS Reports \(PDF\)](#) student guide on the CalPERS website.

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 interface. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Me. A sidebar on the left contains 'Common Tasks' and 'Menu' sections. The 'Menu' section includes 'Organization Search', 'Adjustment Reports', and 'Search Payroll Records'. The main content area shows 'Name: Department Name' and 'CalPERS ID: 9876543210'. Below this is a 'Create or Edit Report' section with a 'Method:' dropdown menu set to 'Verify Dependents' and a 'Continue' button.

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. It has two radio buttons: 'Search by Verification End Date' (selected) and 'Search by Subscriber'. The 'Search by Verification End Date' option has a date dropdown set to '05/31/2019'. Below these are input fields for 'CalPERS Id:', 'SSN:', 'Last Name:', and 'First Name:'. There are 'Search' and 'Clear' buttons at the bottom left. 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', all enclosed in a red box.

Refer to the following page for the report descriptions.

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 Reports Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog
 - Run in Reports
 - 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 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.