myCalPERS Health Dependent Eligibility Verification

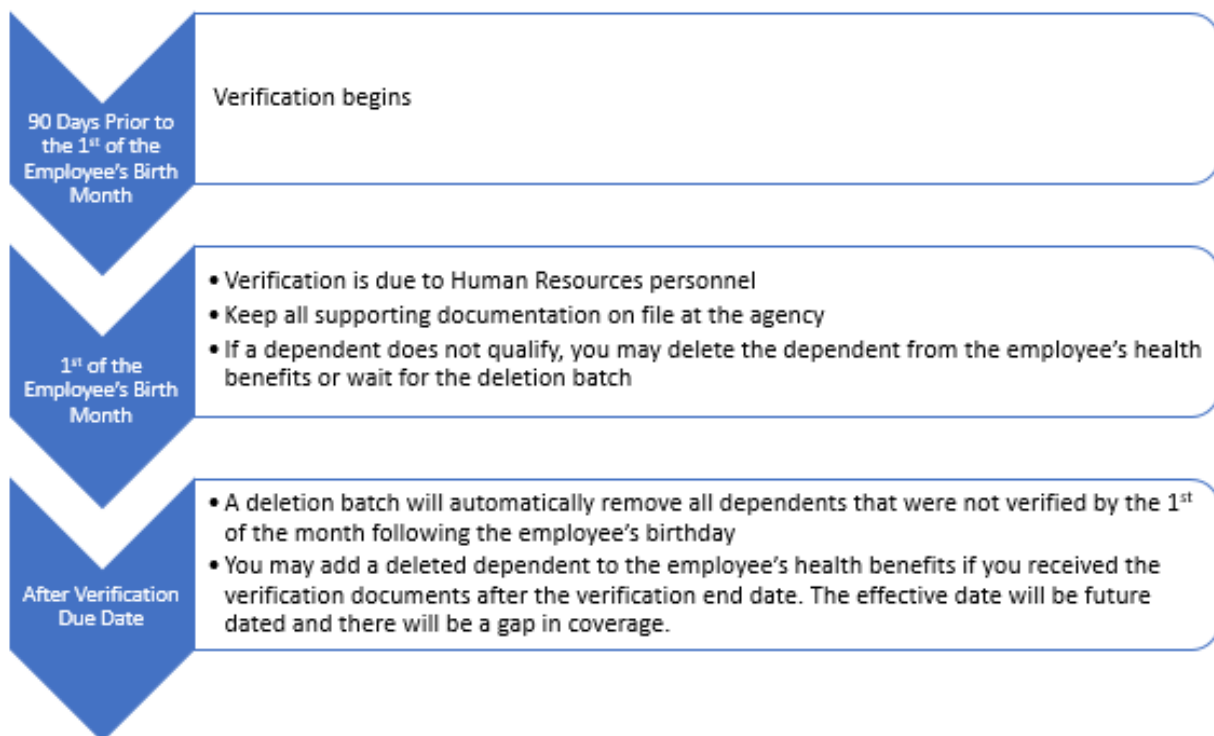Student Guide

October 19, 2024

CalPERS

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

90 Days Prior to the 1st of the Employee's Birth Month

Verification begins

1st of the Employee's Birth Month

- Verification is due to Human Resources personnel
- Keep all supporting documentation on file at the 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 received the verification documents after the verification end date. The effective date will be future dated and there will be a gap in coverage.

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).

Contents

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.

Contents
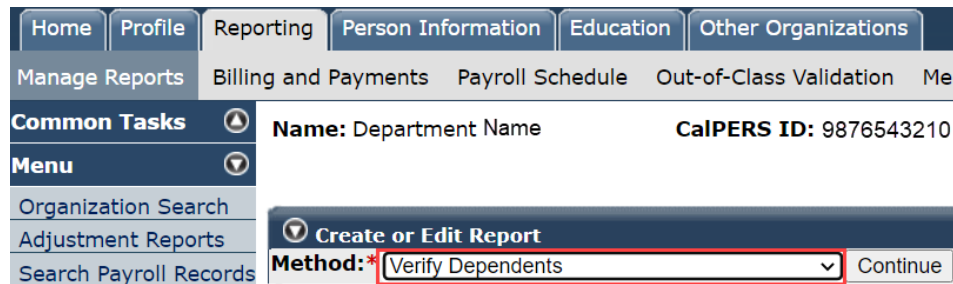
Scenario 1: Verify Dependent

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.

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.
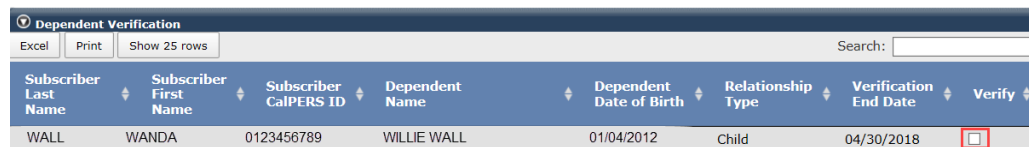
Step 5	Complete the Search for Dependents Reporting Verification section.
Step 6	Select the **Verify** check box(es) for the appropriate dependent(s).

Step 7	Select the **Confirm** button at the bottom left.
	You have completed this scenario.

Scenario 2: Add Dependent

Step Actions (10 Steps)

Add Health Enrollment Transaction

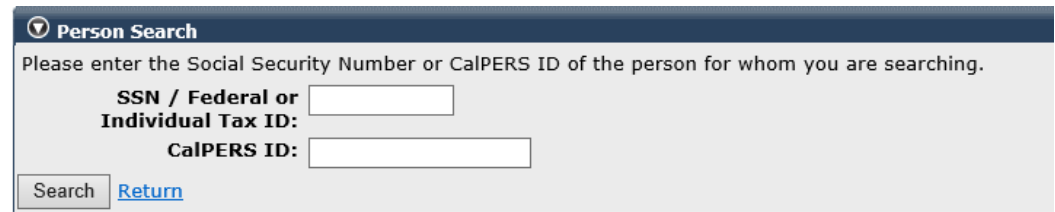|	
Step 1	Select the **Reporting** global navigation tab.
Step 2	Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

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 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.

Step 3   Select the **Continue** button.
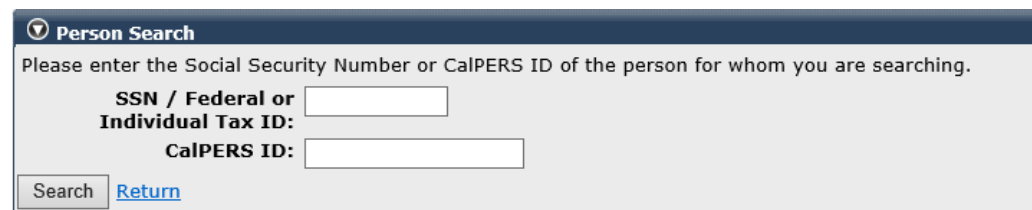
Search for the Subscriber

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 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.

Step 10	Select the **Continue** button.
Step 11	Select one of the four options in the health transaction confirmation:

You have completed this scenario.

Unit 3: 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.
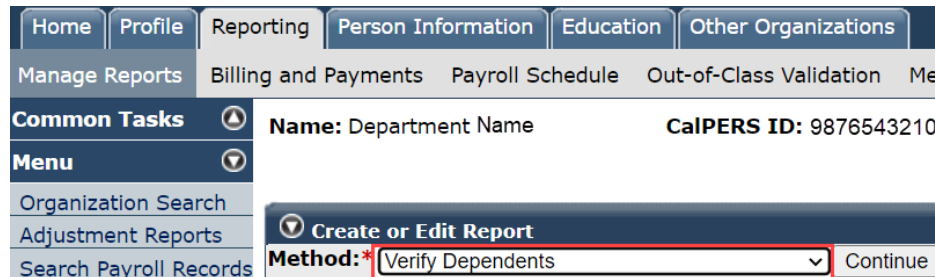
Step Actions

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.

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:
Verification End Date based on Verification Calendar:
Verification End Date entered by the user:

Department Name
05/31/2019

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	WALLLY	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 at www.calpers.ca.gov.

- **Business Rules & myCalPERS Classes**
  Pathway: CalPERS website > Employers > I Want To…: Attend Training & Events > Business Rules & myCalPERS Classes

- **myCalPERS Student Guides & Resources**
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides

- **myCalPERS Health Aid: Health Event Types and Reasons for Employers (PDF)**
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides > **Health** > myCalPERS Health Aid: Health Event Types and Reasons for Employers (PDF)

- **Frequently Asked Questions (FAQ)**
  Pathway: CalPERS website > About > Resources: Questions, Comments, & Complaints > Frequently Asked Questions

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

- **myCalPERS Technical Requirements**
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements

- **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)**
  Pathway: CalPERS website > In the search box at top right, enter HBD-120 > **CalPERS Health Program Guide** link

- **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)

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.