



Dependent Change Addition / Deletion Procedure (BEN-P022)

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

1.0 SCOPE:

- 1.1 This procedure describes the process in which the Risk Management office manages Group Health dependent changes for employees at the Washoe County School District.

2.0 RESPONSIBILITY:

- 2.1 Risk Manager

3.0 APPROVAL AUTHORITY:

(Approval signature on file)

- 3.1 Risk Management Senior Technician

Signature

Date

4.0 DEFINITIONS:

- 4.1 TPA – Third Party Administrator

5.0 PROCEDURE:

- 5.1 The Risk Management Office is in receipt of a completed Enrollment Change Form (BEN-F001).
- 5.2 The form is evaluated for the type of dependent change, pre-tax or after tax premium deduction or whether Special Enrollment Rights apply. See Special Enrollment Rights Work Instruction BEN-W001.
 - 5.2.1 If the form is not completed correctly the employee is contacted and requested to come to the Risk Management Office.
- 5.3 The Risk Management Office is in receipt of quarterly student status update report from TPA, CDS Group Health, reflecting name of dependents that have not provided proof of student status and need to be removed from coverage.

Pre-Tax Qualifying Event

- 5.4 If pre-tax, determine if it is a qualifying event.
 - 5.4.1 A qualifying event consists of but is not limited to death, marriage, divorce, birth of child, student status change, over age dependent, and change of employment. The qualifying event must be reported within 30 days.
 - 5.4.2 If the 30 days has elapsed, the employee must wait until open enrollment.
- 5.5 The employee is contacted to fill out the Pre-Tax Change Form and provide appropriate documentation verifying the event.
- 5.6 The change is made in the financial software system.
- 5.7 The change is entered into the CDS system and a copy of the change is sent to Hometown Health if applicable.

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Pre-Tax Non-Qualifying Event

5.8 If Pre-Tax non-qualifying event, the employee is notified that the paperwork has been rejected and they will have to wait until open enrollment.

After Tax Change

5.9 If a deletion, the employee will complete the Enrollment Change Form BEN-F001.

5.9.1 The employee may make a deletion of after-tax change at any time. This information can be found in the Plan documents.

5.10 The change is made in the financial software system.

5.11 The change is entered into the CDS data system.

5.12 If an addition, the employee will complete the Enrollment Change Form BEN-F001 and provide appropriate documentation verifying the event.

5.12.1 An addition outside of open enrollment can only be made if it is a qualifying event.

5.13 The change is made in the financial software system.

5.14 All form(s) are filed in the employee file.

6.0 ASSOCIATED DOCUMENTS:

6.1 Enrollment Change Form (BEN-F001)

6.2 Pre-Tax Change Form

6.3 Special Enrollment Rights Guidelines (BEN-W001)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Enrollment Change Form	Risk Files	6 years after coverage ends	Discard as desired	Locked Office
Pre-Tax Form	Risk Files	6 years after coverage ends	Discard as desired	Locked Office

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8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
6/2/05	A	Initial release
5/15/07	B	Revised title of department in 1.1; corrected typographical errors in 5.3.1, 5.4, and 6.2.
7/23/08	C	Added 5.3 and renumbered document accordingly.
05/04/09	D	5.4.1 changed "overage" to "over age"; 5.6 replaced "Bi-Tech System" with "financial software system"; 5.10 replaced "Bi-Tech System" with "financial software system"; 5.13 replaced "Bi-Tech System" with "financial software system."

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