

## **DEPENDENT ELIGIBILITY AND VERIFICATION PROCESS**

### **RESPONSE REQUIRED! FAILURE TO RESPOND WILL TERMINATE ELIGIBILITY FOR HEALTH BENEFIT COVERAGE IN 2007-08.**

To meet the IRS requirements for dependency status, to ensure that only eligible dependents are enrolled and to meet health plan contract obligations, the District must verify family member eligibility. Therefore, the District and the insurance carriers reserve the right to request documentation (tax records) to verify **all enrolled family members**. Same sex domestic partners are not required to go through this verification process. Please do not submit any documentation unless HR/Benefits or your carrier requests it.

The District contracts with UltraLink-Secova to perform an ongoing verification of enrolled dependent for all insurance carriers. By August 17, 2007, employees who have enrolled dependent(s) for Plan Year 2007/2008 will be required to respond to an audit from UltraLink-Secova. Employees will have 30 days to respond. **The deadline is September 14, 2007.**

To satisfy the IRS requirements as qualified eligible dependents, your spouse and all Qualifying Children up to the age of 24, must be claimed by the employee as IRS taxable dependents on 2006 federal income tax returns.

You are required to submit a copy of your **2006 Federal Income Tax Return (form 1040)**. **Please do not provide any supplemental tax records, only the first page and the signature page is required.**

For individuals who have filed their **1040 tax return electronically**, we will **accept a copy of "efile Copy Do Not Mail" stamped on the first and last page**, a signature above the stamp is not required. In addition, you are required to sign off the certification statement which UltraLink-Secova has customized for you to certify that the submitted evidence is true, accurate and complete for benefit purposes. **You may strike through/obliterate the financial information and submit only the last 4 digits of the SSN (i.e. ID xxx-xx-1234) for identification purposes.**

If you did not claim your taxable dependent child(ren) on the 2006 federal income tax returns, you must provide a notarized statement certifying that your eligible dependents meet the IRS definition of a Qualifying Child. This means you provide more than half of the child's support for the year, and you have custodial rights. Please note children between the ages of 19 and 24 must also be full-time students. **Effective January 1, 2008, if you wish to enroll them for dependent coverage, you are required to claim all IRS Qualifying Child(ren) and/or Spouses on your federal income tax return.**

According to the IRS, if the dependent is not a tax qualified dependent, the employee must pay their portion of the contributions after tax and the District's contribution towards the monthly premium equivalent should be counted as imputed income to the employee.

If you are divorced and required to carry coverage for dependent(s), but cannot claim your dependent(s) per court order, please submit the **Court Order Statement** in lieu of the 1040 statement.

In lieu of the tax form noted above, the Plan will accept the following documents as proofs of legal dependent status for spouses: **2006 property tax records** that show co-ownership or **current rental agreement** that clearly defines the relationship of the two individuals.

**TO REQUEST AN EXTENSION DUE TO LATE INCOME TAX FILING:** Employees who delay filing income taxes must submit a copy of the **2006 Application for Automatic Extension of Time to File U.S. Individual Income Tax Return (Form 4868)** to UltraLink-Secova no later than the deadline of **September 14, 2007** to request an extension. The extended deadline is **October 15, 2007**. **Failure to provide the required documentation by the deadline will disqualify the dependent for coverage retroactively.**

Thereafter, dependents age 19 and older will be notified 60 days prior to the birth month to comply with the verification process. **Failure to comply will result in termination of coverage on the last day of the birth month and re-enrollment will not be allowed until the next plan year.** In addition, employees may be responsible for any employer contributions to and benefits paid by the plan for ineligible coverage.

When submitting your documents to UltraLink-Secova by fax, be sure to keep a copy of the fax transmission confirmation as proof that your paperwork has been submitted. To request a confirmation that Ultralink-Secova has received your documentation via fax, please allow up to 48-72 hours to request a response by email to: [Foothill.DeAnza@ultralink.com](mailto:Foothill.DeAnza@ultralink.com).

**If you have any questions, please contact UltraLink-Secova on or after August 17, 2007 toll free (866) 208-3204 (Monday-Friday 5 a.m. – 6 p.m. PST), Fax: (714) 428-8370 or via email: [Foothill.DeAnza@ultralink.com](mailto:Foothill.DeAnza@ultralink.com). Mailing address: UltraLink-Secova, P. O. Box 5080, Costa Mesa, CA 92628-9968.**