



Benefits Department
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December 15, 2023

To: Stockton Unified School District Employees

From: Richard Boyd, Director of Labor Relations

**THE 2024 DEPENDENT VERIFICATION REVIEW
WILL BE HELD FROM FEBRUARY 5, 2024 THROUGH MARCH 15, 2024.**

The purpose of this letter is to inform you of the upcoming **Dependent Verification Review (DVR)** that **will begin February 5, 2024 through March 15, 2024**. At least once every (3) three years, California Government Code Section 22843.1 requires your Employer to verify the eligibility of your dependent(s) covered under the District's benefit plans.

As part of SUSD's ongoing efforts to ensure our benefit plans meet the regulatory requirements of CalPERS and to help manage the cost of our plans for you and for SUSD, we are conducting a review to verify that only eligible dependents are enrolled in our medical, dental, vision and chiropractic plans.

The District is working with American Fidelity Assurance Company to conduct the review. During the review period, American Fidelity Benefit Counselors will meet with every benefit eligible SUSD employee, to verify their dependent(s) eligibility to remain on their benefit plans by reviewing verification documents. We realize that some employees may have already provided verification documents when enrolling dependent(s) during the recent open enrollment or new hire enrollment periods. However, you will need to resubmit the required dependent verification documents during your appointment, to complete the DVR process.

REQUIRED VERIFICATION DOCUMENTS (legible copies of the original documents are acceptable):

Spouse	Domestic Partner	Natural-Born Child(ren)	Stepchild(ren)	Adopted, Foster, Legal Guardianship
Government issued Marriage Certificate and 2022 IRS 1040 Form (if you file together), Or recent household bill/bank/loan statement with both names listed (dated within the last 60-days)	State issued Registered Domestic Partnership Certificate and 2022 IRS 1040 Form (if you file together), Or recent household bill/bank/loan statement with both names listed (dated within the last 60-days)	Certified Birth Certificate (County issued)	Certified Birth Certificate naming the current Spouse (of the Employee) as the Parent	Court issued Legal Guardianship documents, Certified Birth Certificate & Parent Child Affidavit Form (if applicable)
➤ Social Security Card or current IRS 1040 Tax Form is required to verify the SSN for each dependent enrolled in your benefit plans (dependents with an ITIN can provide an IRS document with their ITIN listed)				

APPOINTMENT SCHEDULE & DETAILS

Employees will need to schedule either, a Virtual or In-Person appointment with an American Fidelity Benefit Counselor to complete the Dependent Verification Review process. In-person appointments will be conducted on specific days at each District site during the review period. The appointment schedule will be provided soon. During your appointment, you will also have the opportunity to receive more information on your benefit plans, *however this is not an open enrollment opportunity to make changes to your current District benefit plans.*

FREQUENTLY ASKED QUESTIONS

- **Do I need to personally meet with an American Fidelity Benefit Counselor?**

Yes. The review must be completed by the employee meeting with an American Fidelity Benefit Counselor. The employee must show the required dependent verification documents for their enrolled dependents and personally sign the dependent review form.

- **Am I required to meet with an American Fidelity Benefit Counselor if I currently do not have dependents enrolled in my benefit plans?**

Yes. We are seeking a true and complete review. Although you are enrolled with single coverage, we still need to account for and verify your record. Some of you may assume that you no longer have dependents listed under your health plans; during the review, you may find that those dependents were never removed. This will be an opportunity for you to correct any discrepancies in our records.

- **How do I schedule an appointment?**

Information will be sent to you soon with a link and QR code to schedule your appointment.

- **Can I meet with the District's Benefits Department instead of an American Fidelity Benefit Counselor?**

No. The District's Benefits Team cannot meet with you for this purpose, or provide you with any dependent documents that were submitted previously to their office. You must schedule an appointment with American Fidelity to complete the DVR process.

- **What if I refuse to meet with an American Fidelity Benefit Counselor?**

All employees who are currently enrolled in a District benefit plan (medical, dental, vision, or chiropractic) and those who waive the District's medical plan, must make an appointment to meet with an American Fidelity Benefit Counselor.

If you do not complete the DVR process to provide the required verification documents, your Dependent's benefit coverage will be terminated effective May 1, 2024. COBRA may not be available to a dependent whose coverage was terminated if that dependent is not an eligible dependent under the benefit plan(s).

- **Are these mandatory meetings with American Fidelity Benefit Counselors an invasion of privacy?**

No. American Fidelity is subject to HIPAA Privacy Regulations and may not use or disclose any employee information for any purpose other than this review. Further, American Fidelity will not retain copies or originals of dependent verification documents.

- **What happens if I do not complete the review by the due date, March 15, 2024?**

The benefit coverage for your dependent(s) will be terminated from the District's plans, effective **May 1, 2024**. As a result, you should not delay in meeting with an American Fidelity Benefit Counselor to complete your DVR review.

- **I do not have copies of my dependent's verification documents, where can I order them?**

You are encouraged to order the needed verification documents now, so you can receive them in time for the review period. **For child birth certificate copies**, you can contact the County Recorder's Office in the county your child was born. Online options are also available by visiting www.vitalchek.com or www.usbirthcertificate.net

To obtain a replacement Social Security Card, you can submit the request online <https://www.ssa.gov/number-card/replace-card> or visit your local Social Security Office.

Please note, there may be a cost to obtain the documents and no reimbursement will be provided. These documents are vital not only for this DVR process, but also for other personal use.

If you have any questions, please contact the **Benefits Department at 209-933-7026** or send an email to benefits@stocktonusd.net

Regards,

Richard Boyd

Richard Boyd
Director of Labor Relations
Stockton Unified School District

Cc: Human Resources