State HR Professionals Manual

Benefits Division

Contents

Introduction

The Family Connect Portal (FCP) was designed to provide departmental personnel offices with a sustainable tool to verify and maintain dental and premier vision benefits for employees and/ or their dependent(s). The FCP will assist departmental personnel offices with capturing and tracking dependent enrollments in the state-sponsored dental and Premier vision plans to assist with eligibility and enrollment activities.

The FCP will also allow departmental personnel offices to access benefits and demographic related reports, identify dependents who are no longer eligible for dental and/ or vision benefits and initiate disenrollment of ineligible dependents.

Effective October 2025, the FCP has been enhanced to maintain a list of authorized departmental personnel who may contact or be contacted by health, dental, and vision carriers regarding updates for state employees and their dependents' benefits. This authorized list is known as the Vision, Dental, and Health Authorization (VDHA) list and includes the names and identifying information of the State of California Departmental Personnel Office staff and CalPERS Health Benefit Officers in their call center who are authorized by their department supervisors/managers to speak directly to the vision, dental, and health benefit carriers to make changes to employee and retiree benefits.

CalHR's Benefits Division will be providing the VDHA list to State of California dental and vision benefit carriers and will share the list with CalPERS administrators to share the VDHA list with State of California health carriers. The FCP Manual has been updated to provide details on newly created roles and how to manage them in FCP to make sure the VDHA list is updated and maintained for benefit carriers and departmental personnel offices.

Authority/References

California Government Code sections 19815.9, 22952 and California Code of Regulations (CCR), Title II, section 599.855 requires departmental personnel offices to re-verify the eligibility of spouses, domestic partners, and dependent children in the state's health and dental benefit programs at least once every three years.

The federal Patient Protection and Affordable Care Act requires departmental personnel offices to remove dependent children from the state's health and dental benefit plans once they reach age 26.

Consolidated Omnibus Budget Reconciliation Act (COBRA) requires departmental personnel offices to notice and offer continuation health, dental, and vision benefits coverage to employees, former employees, spouses, former spouses, and dependent children when their coverage is cancelled due to a COBRA qualifying event.

User Agreements

Security Agreement

All Department and VDHA Administrative users must sign and submit the **FCP State Department Security Agreement** before they can be granted access to FCP. All Department and VDHA account users will be required to adhere to the FCP operational standards.

FCP Online User Agreement
Each account user must acknowledge and adhere to the FCP Online User Agreement which states the following:

FCP is a California Department of Human Resources (CalHR) computer system which may be used and accessed for official Government business only by authorized personnel.

UNAUTHORIZED ACCESS TO ANY STATE OF CALIFORNIA COMPUTING SYSTEM IS A CRIMINAL VIOLATION OF PENAL CODE SECTION § 502 AND/OR APPLICABLE FEDERAL LAW AND IS SUBJECT TO PROSECUTION.

Accessing any system while exceeding one's authorization or in ways not intended by the State of California shall be subject to disciplinary action, prosecution or both. Users shall have no expectation of privacy in the use of these computing systems as all actions may be recorded and monitored.

1.0 FCP User Accounts

Departmental Personnel Offices can create four types of user accounts in FCP:

- VDHA Administrative (VDHA Admin) (required)
  - VDHA
- Department Administrative (Dept Admin) (required)
  - Department User

VDHA Admin User Account

The **VDHA Admin** role has view, add, and remove access for the VDHA users that share the same agency code(s) as their role. This role can access and export the Manage Users Report to view all VDHA authorized personnel for their respective agency code(s) they manage.

Each state departmental personnel office is required to create at least one VDHA Admin user account in FCP. If the department already has a Dept Admin role, they may use this role to manage VDHA users. Multiple VDHA Admin users are permitted. Please assess your business needs and determine the number of VDHA Admin user accounts that work best for your department.

- The department's VDHA Admin user must be at a supervisory level or higher
- CalHR's DRV Unit will review and verify each VDHA Admin user account request
- FCP system access will be approved after the account request has been reviewed and approved and after the VDHA Admin user submits a completed FCP Security Agreement form to CalHR's DRV Unit

VDHA Admin users can:

- Approve their personnel office's VDHA user accounts
- Manage their VDHA users by maintaining access and deactivation of accounts
- Access the VDHA List for their department/agency code(s)

    - VDHA List FCP navigation: Click on the Admin icon in the top section of the page > click on Manage Users

Note: CalHR's DRV Unit will reach out to VDHA Admin user(s) regarding compliance and security issues.

This role will be primarily used by CalPERS Health Benefit Officers in the call center.

VDHA User Account

Each departmental personnel office can have multiple VDHA user accounts in FCP. VDHA user account requests are reviewed and approved by Dept Admin user and/or VDHA Admin user.

In the absence of an active VDHA Admin user account, CalHR's DRV Unit will substitute as that department's VDHA Admin user and will provide guidance and assistance to maintain the continuity of required processes.

VDHA users can:

- View and access their contact information on the Manage Users report under the Admin tab of the FCP.

Department Admin (Dept Admin) User Account

Each state departmental personnel office is required to create at least one Dept Admin user account in FCP. Multiple Dept Admin users are permitted. Please assess your business needs and determine the number of Dept Admin user accounts that works best for your department.

- The Dept Admin user must be at a supervisory level or higher
- CalHR's DRV Unit will review and verify each Dept Admin user account request
- FCP system access will be approved after the account request has been reviewed and approved and after the Dept Admin user submits a completed FCP Security Agreement form to CalHR's DRV Unit

Dept Admin users can:

- Approve their departmental personnel office's Department User and VDHA accounts
    - Department User and VDHA accounts will need to have access to the same agency codes and be authorized to be included on the VDHA list.
    - Department Users that do not need to be included in the VDHA list can be created as Department Users only.
- Manage their Department Users by maintaining access and deactivation of accounts
- Review employee and dependent demographics and benefit enrollment information for accuracy
- Review demographic and benefit enrollment data exceptions
- Process re-verifications
- Delete employee and dependent accounts in FCP
- Approve employee and dependent deletion requests in FCP
- Document notification of the Age Out (26 year) process
- Access the following reports
    - Birth Month Cycle

    - Dependent Age Out
    - DRV Delinquency
    - Pending Deletion Dependent List
    - Undeliverable Mail
    - Manage Users (under the Admin tab in the FCP)
    - View and access their contact information on the Manage Users report under the Admin tab of the FCP.

Note: CalHR's DRV Unit will reach out to Dept Admin user(s) regarding compliance and security issues.

Department User Account

Each state departmental personnel office can have multiple Department User accounts in FCP. Department User account requests are reviewed and approved by Dept Admin User. These accounts may also have access to be included in the VDHA list. Department Users who only need access to the FCP for DRV reverification transactions should not be included as VDHA in addition to the Department User designation.

In the absence of an active Dept Admin user account, CalHR's DRV Unit will substitute as the Dept Admin user and will provide guidance and assistance to maintain the continuity of required processes.

Department Users can:

- Review employee and dependent demographics and benefit enrollment information for accuracy
- Review demographic and benefit enrollment data exceptions
- Process dependent re-verifications for dental and/or premier vision
- Delete deactivated or duplicate dependent accounts in FCP
- Document notification of the Age Out (26 year) process
- Access the following reports
    - Birth Month Cycle
    - Dependent Age Out
    - DRV Delinquency
    - Undeliverable Mail

Requesting a User Account – All Users

The following steps may be used to request any account type in the FCP.

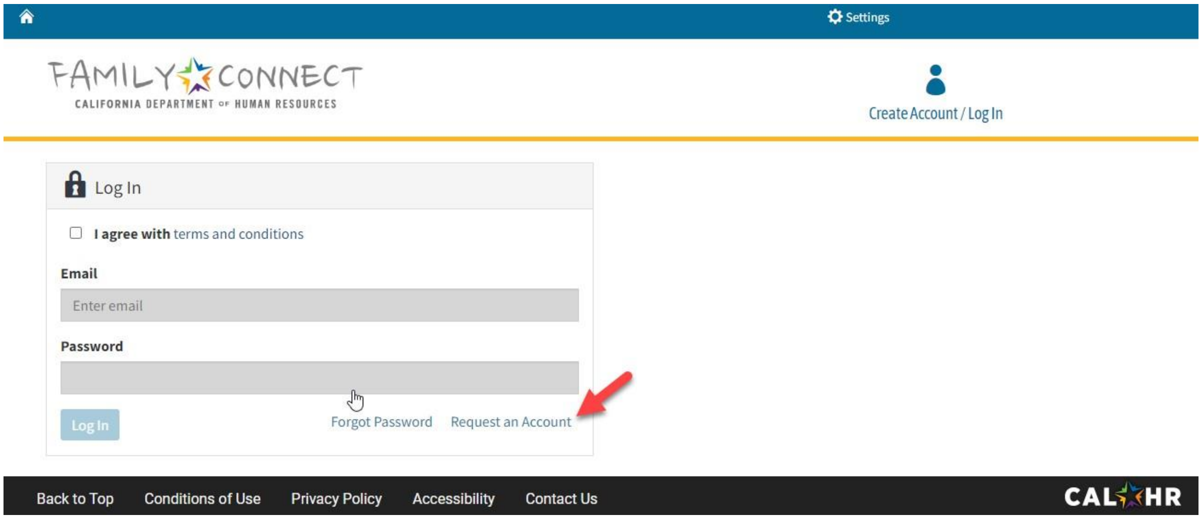
Step Actions

Step 1:

Visit the Family Connect Portal website at https://fcp.calhr.ca.gov

Step 2:

Select the **Request an Account** link



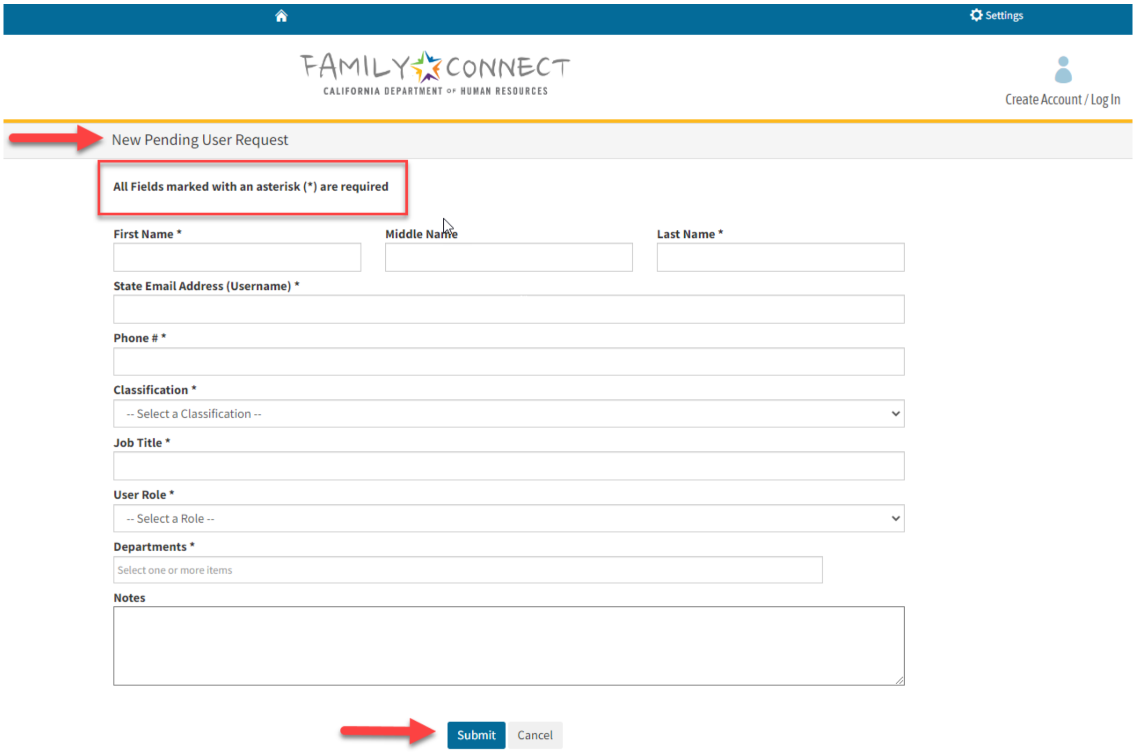
Step 3:

The New Pending User Request screen is displayed. Enter your information in all the required fields marked with an asterisk (*) and then select the Submit button.

You will need to complete the following fields:

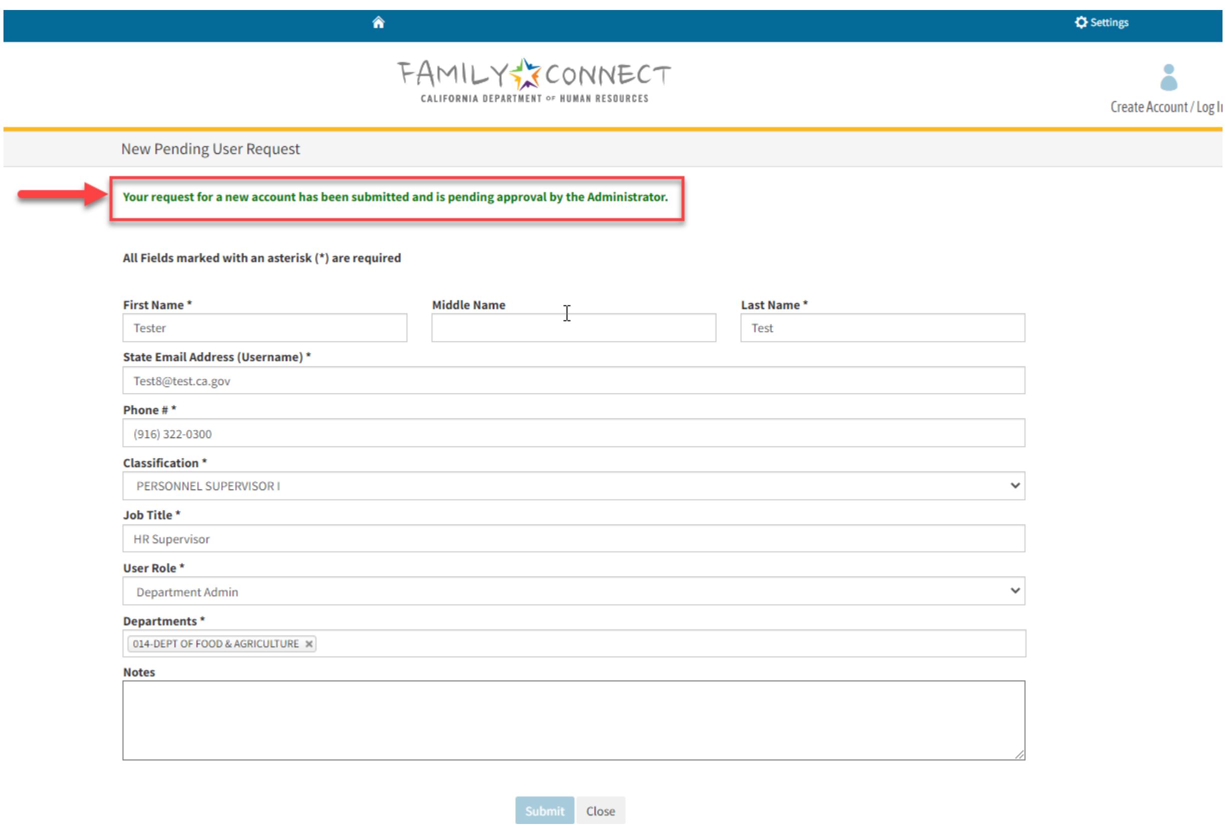
1. Data enter "First Name"
2. Data enter "Last Name"
3. Data enter "State Email Address"
4. Data enter "Phone #"
5. Click on dropdown "Classification" and select your current classification
6. Data enter "Job Title"
7. Click on dropdown "User Role" and select "Department User", "Department Admin", "VDHA Admin", or "VDHA"
8. Click on dropdown "Departments" and select all applicable department(s)
9. Select "Submit"

Once you select the "Submit" button, your request will be sent to your department's Admin user for approval or denial. If your Dept Admin user approves your request, you will receive an email to update your password. If you receive a denial request, please work with your department's Admin user regarding your access and the reason for denying your request.



Step 4:

The following confirmation message will be displayed: **Your request for a new account has been submitted and is pending approval by the Administrator**



This completes your user account request submission process.

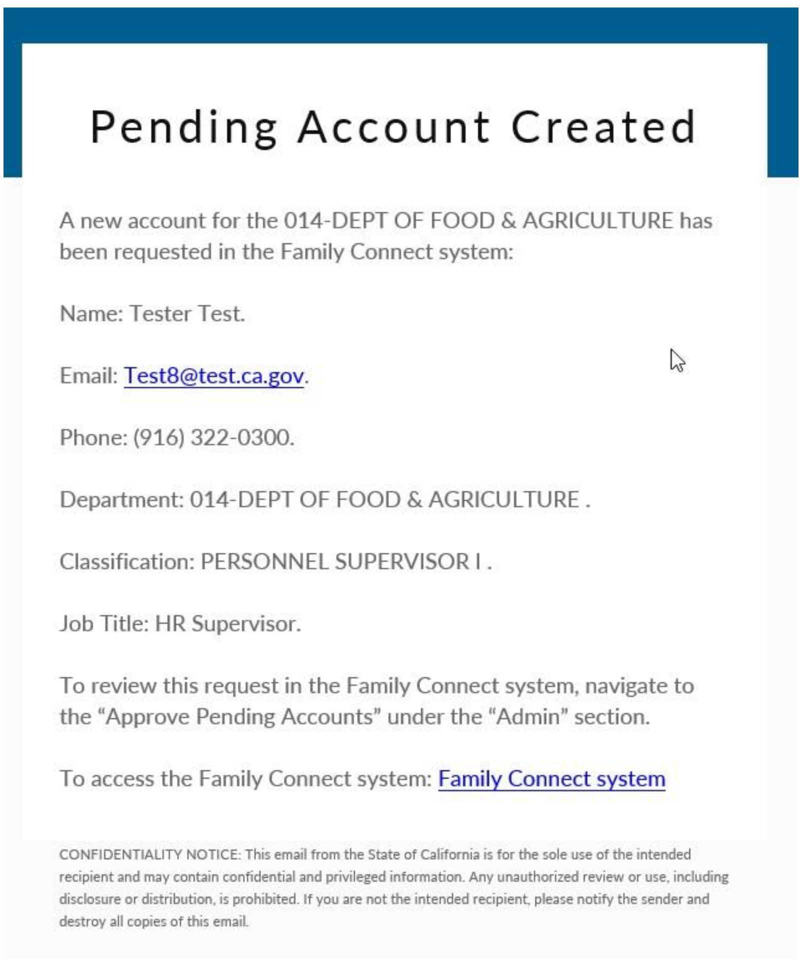
Dept Admin and VDHA Admin Account Review & Approval Process

All Dept Admin and VDHA Admin user account requests are reviewed and approved by CalHR's DRV Unit.

Step Actions

Step 1:

Account requests from Dept Admin and VDHA Admin users, along with the requester's information, are submitted to the CalHR Admin user (DRV Unit). The CalHR Admin user receives an email notification to review the Pending Account in FCP.



Pending Account Created

A new account for the 014-DEPT OF FOOD & AGRICULTURE has been requested in the Family Connect system:

Name: Tester Test.

Email: Test8@test.ca.gov.

Phone: (916) 322-0300.

Department: 014-DEPT OF FOOD & AGRICULTURE .

Classification: PERSONNEL SUPERVISOR I .

Job Title: HR Supervisor.

To review this request in the Family Connect system, navigate to the "Approve Pending Accounts" under the "Admin" section.

To access the Family Connect system: Family Connect system

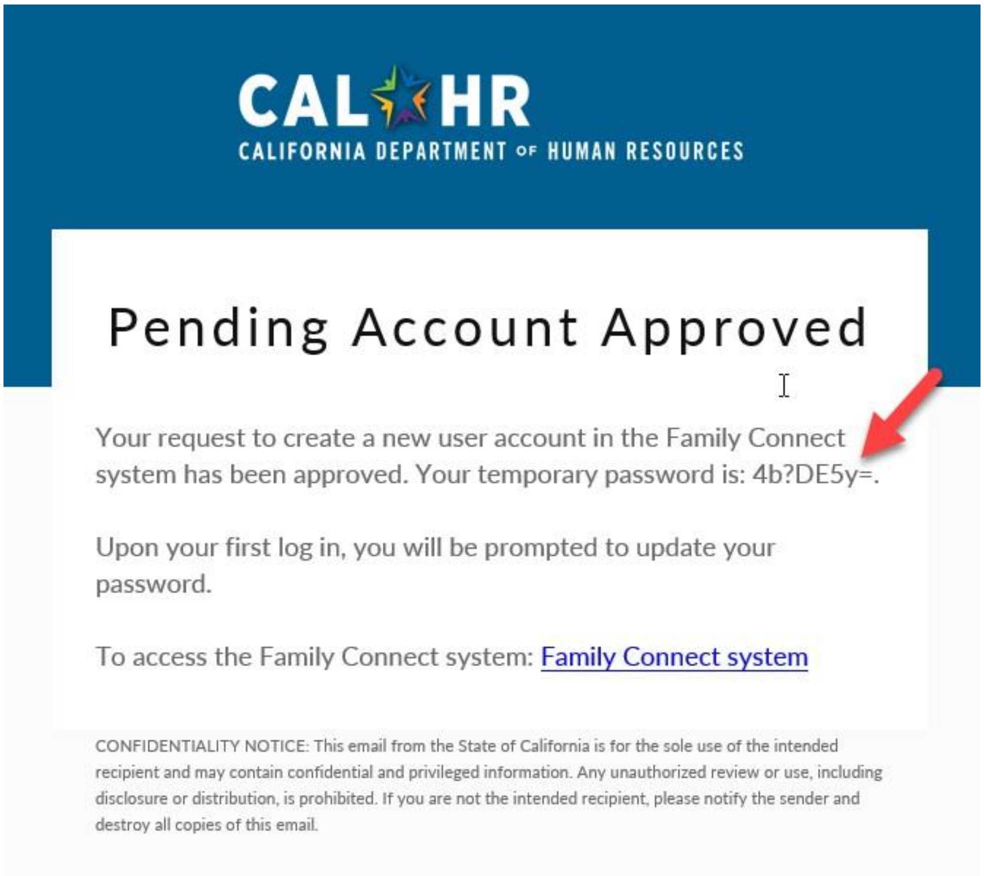
CONFIDENTIALITY NOTICE: This email from the State of California is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review or use, including disclosure or distribution, is prohibited. If you are not the intended recipient, please notify the sender and destroy all copies of this email.

Step 2:

The DRV Unit will review the request and confirm the Admin user's account information by sending an email to the state email provided on the request form. If not already submitted, within this email will be a request for the Admin user to submit a signed and dated FCP State Department Security Agreement.

Step 3:

Once the DRV Unit verifies the Admin user's account information and receives the signed and dated FCP State Department Security Agreement, the Admin user's account will be approved. An Account Approval email notification will be sent to the Admin user's state email address and will contain a temporary password.



Step 4:

Upon your first log in, you will be prompted to update your password.

This completes the Dept Admin and VDHA Admin user's account approval process.

Department User and VDHA Account Review & Approval Process

All Department User and VDHA account requests are reviewed and approved by the Dept Admin user(s). Please note that if there is only a VDHA user account that will be approved by the respective VDHA Admin.

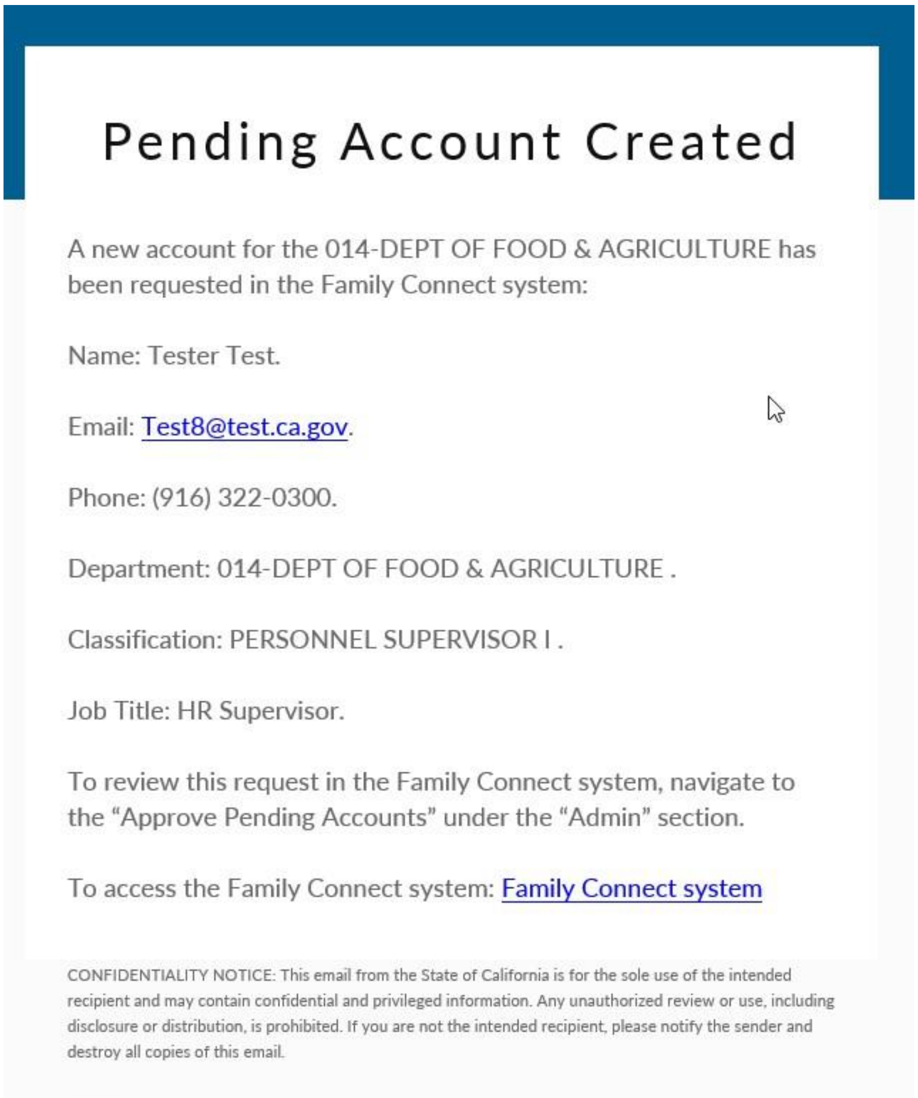
In the absence of an active Dept Admin and VDHA Admin user, the DRV Unit will substitute as the Dept Admin user and will provide guidance and assistance to allow continuation of required processes.

Step Actions

Step 1:

A Dept User's and/or VDHA account request and information is sent to their respective Dept Admin and/or VDHA Admin user.

The Dept Admin and/or VDHA Admin user(s) will receive an email notification to review the Pending Account in FCP.



Pending Account Created

A new account for the 014-DEPT OF FOOD & AGRICULTURE has been requested in the Family Connect system:

Name: Tester Test.

Email: Test8@test.ca.gov.

Phone: (916) 322-0300.

Department: 014-DEPT OF FOOD & AGRICULTURE .

Classification: PERSONNEL SUPERVISOR I .

Job Title: HR Supervisor.

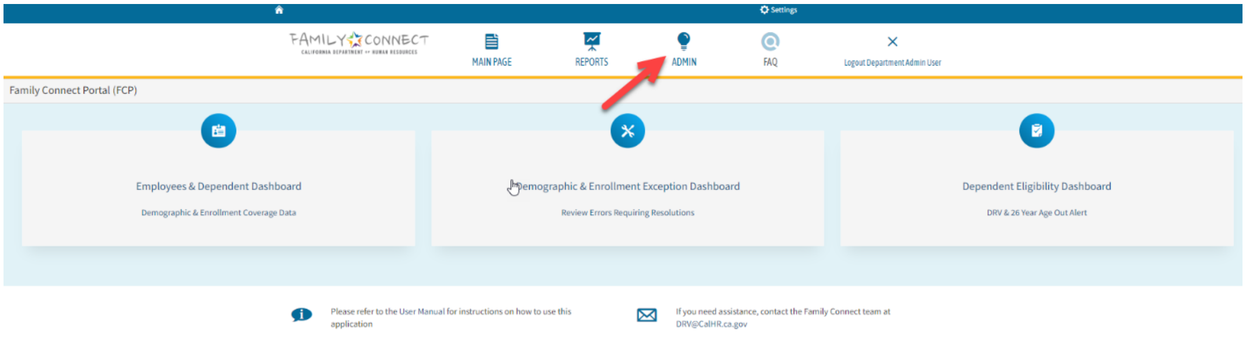
To review this request in the Family Connect system, navigate to the “Approve Pending Accounts” under the “Admin” section.

To access the Family Connect system: Family Connect system

CONFIDENTIALITY NOTICE: This email from the State of California is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review or use, including disclosure or distribution, is prohibited. If you are not the intended recipient, please notify the sender and destroy all copies of this email.

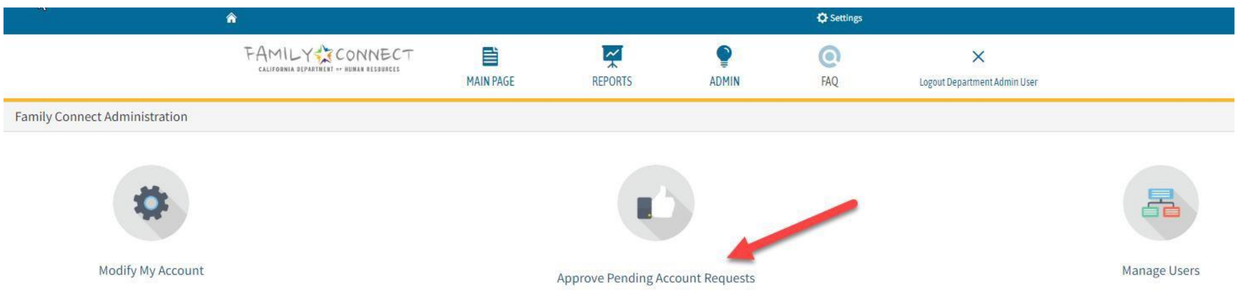
Step 2:

The Dept Admin and/or VDHA Admin user logs into FCP. The **MAIN PAGE** is displayed. From the MAIN PAGE, select the **ADMIN** tab.



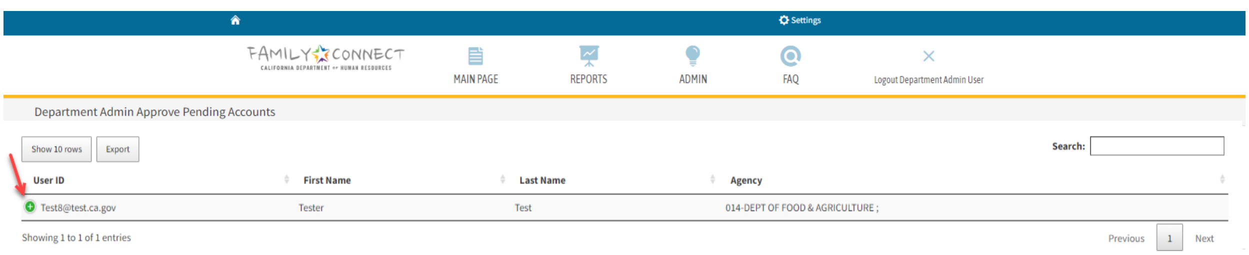
Step 3:

The **Family Connect Administration (ADMIN)** page is displayed. On The ADMIN page, the **Dept Admin and/or VDHA** user selects the **Approve Pending Account Requests** link.



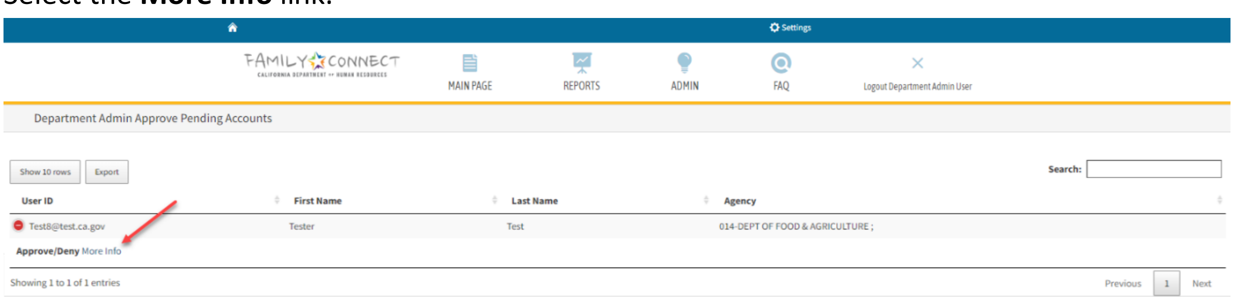
Step 4:

The **Dept Admin and/or VDHA Admin Approve Pending Accounts** page displays. Next the Dept Admin and/or VDHA Admin user will select the **green plus button** next to the User ID to view more information.



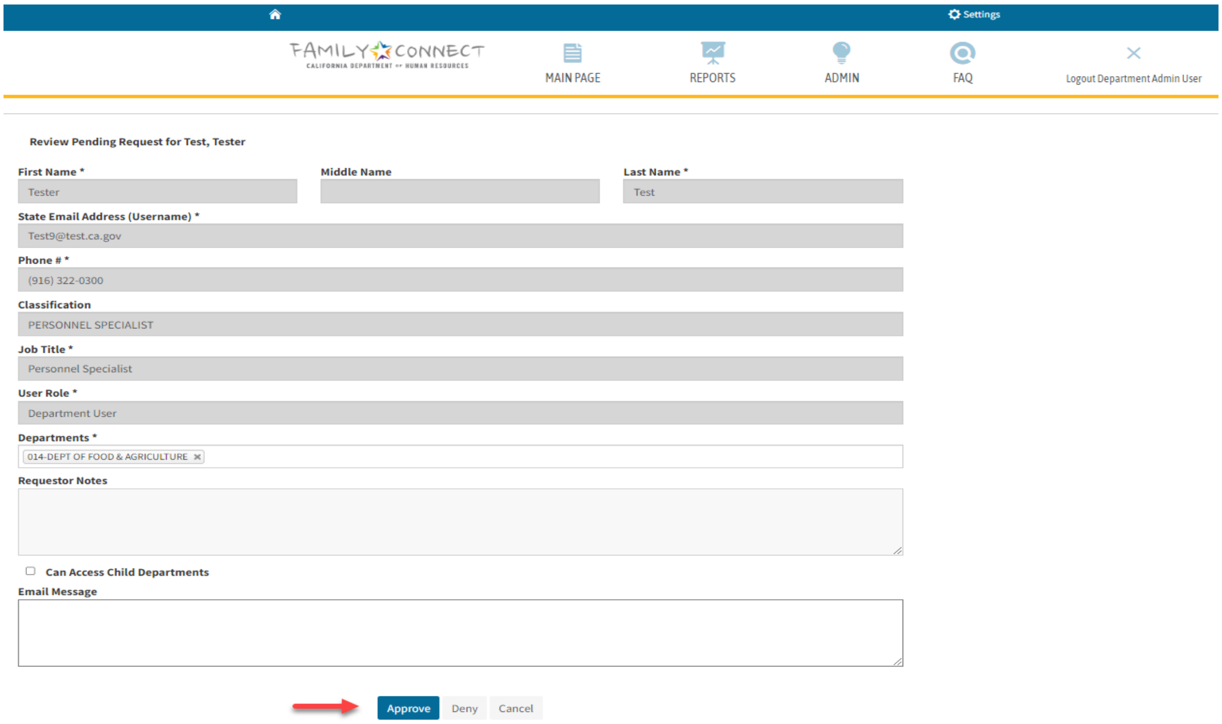
Step 5:

Select the **More Info** link.



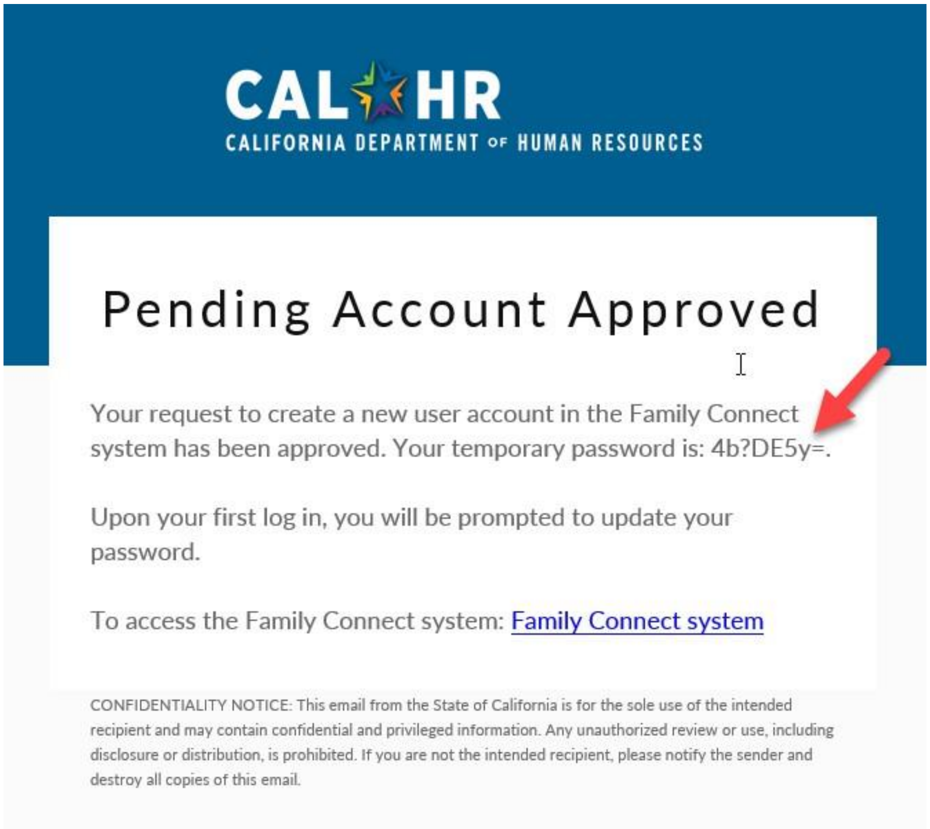
Step 6:
The **Review Pending Request for Department User** page displays.
The Dept Admin and/or VDHA Admin user can now review the Department User and/or VDHA user account information and either **Approve or Deny** request.

Note: The Dept Admin and/or VDHA Admin user has the option to include a note for the requester in the Email Message textbox before selecting **Approve or Deny**. This note will be emailed to the requester.



Step 7:

Once the account request has been approved by the **Dept Admin and/or VDHA Admin**, an Account Approval email notification will be sent to the newly approved Department User and/or VDHA user's state email address and will contain a temporary password.



CAL HR
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

Pending Account Approved

Your request to create a new user account in the Family Connect system has been approved. Your temporary password is: 4b?DE5y=.

Upon your first log in, you will be prompted to update your password.

To access the Family Connect system: Family Connect system

CONFIDENTIALITY NOTICE: This email from the State of California is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review or use, including disclosure or distribution, is prohibited. If you are not the intended recipient, please notify the sender and destroy all copies of this email.

Step 8:

Upon their first log in, the newly approved department and/or VDHA user will be prompted to update their password.

This completes the Department User and/or VDHA user account approval process.

Log In and Initial Password Reset

To begin using the FCP system, you will need to request an FCP account, and your request must be approved. Upon approval of your account request, you will receive an email notification that will contain a temporary password. Your username for the FCP system is your state email address. Upon your first log in, you will be prompted to change your password.

Step Actions

Step 1:

Visit the Family Connect Portal website at https://fcp.calhr.ca.gov

Step 2:

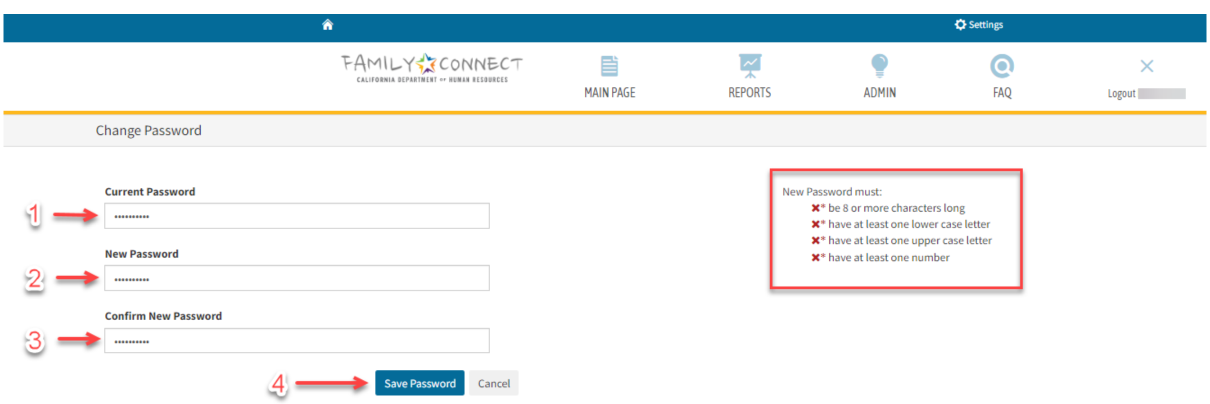
Select the **I agree with** terms and conditions (**FCP Online User Agreement)**

1. Enter your **Username**: state email address
2. Enter your **Password**: temporary password provided via email
3. Select **Log In** button

Step 3:

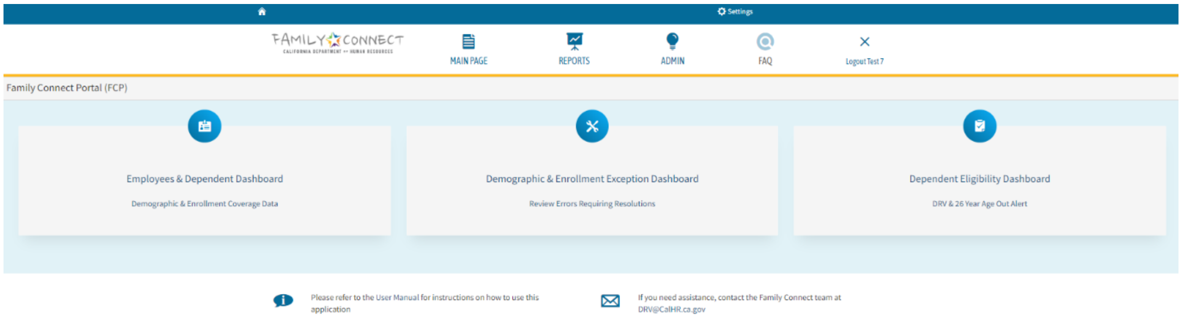
The **Change Password** screen is displayed. This is the same screen that displays if you forgot your password and an Admin User sends you a password reset

1. Enter your current/temporary password
2. Enter your New Password (see New Password requirements)
3. Confirm your New Password
4. Select Save Password button



Step 4:

The **FCP Main Page** is displayed.



In addition, you will receive a **Changed Password** confirmation email.

This completes the Log In and Password Reset process.

Forgot/Reset Password

If you have an account and forgot your password, the following steps will assist you with resetting your password.

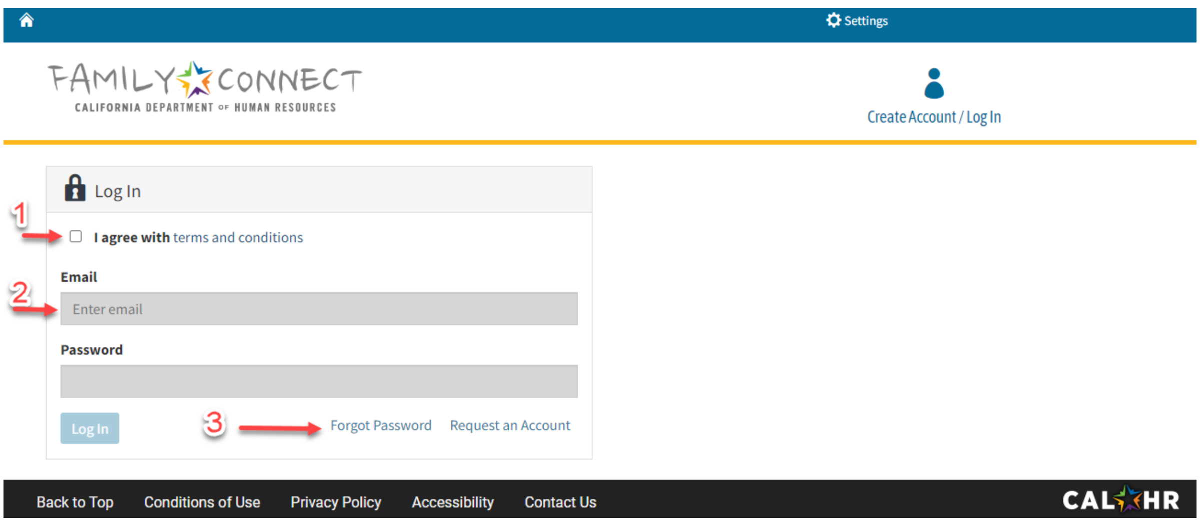
Step Actions

Step 1:

Visit the Family Connect Portal website at https://fcp.calhr.ca.gov

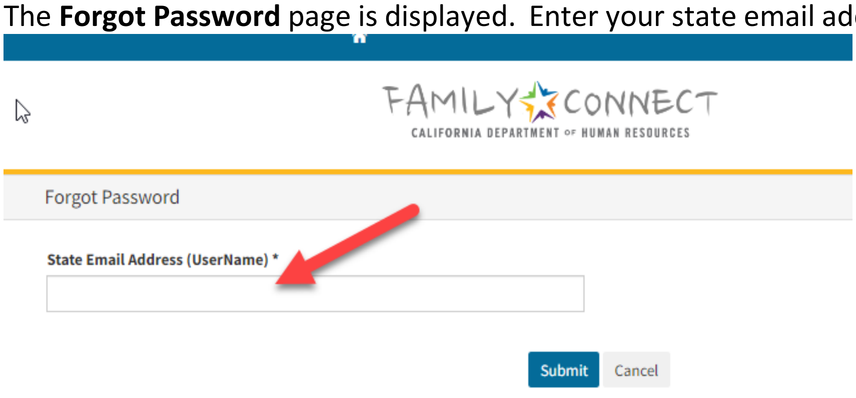
Step 2:

1. Select **I agree with terms and conditions** (FCP Online User Agreement)
2. Enter your **Username**: state email address
3. Select **Forgot Password**



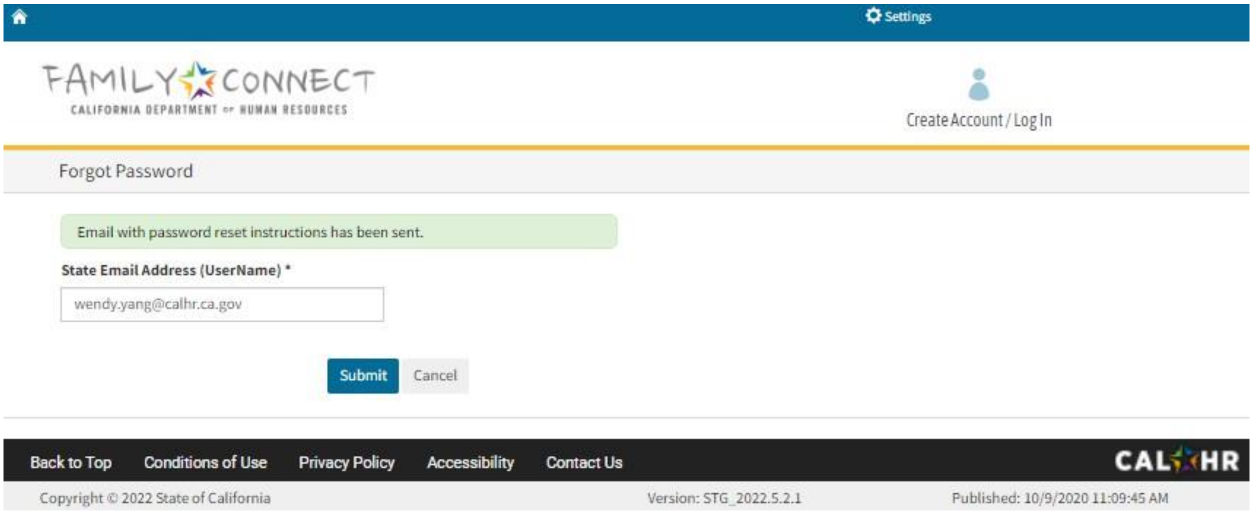
Step 3:

The **Forgot Password** page is displayed. Enter your state email address and select submit.



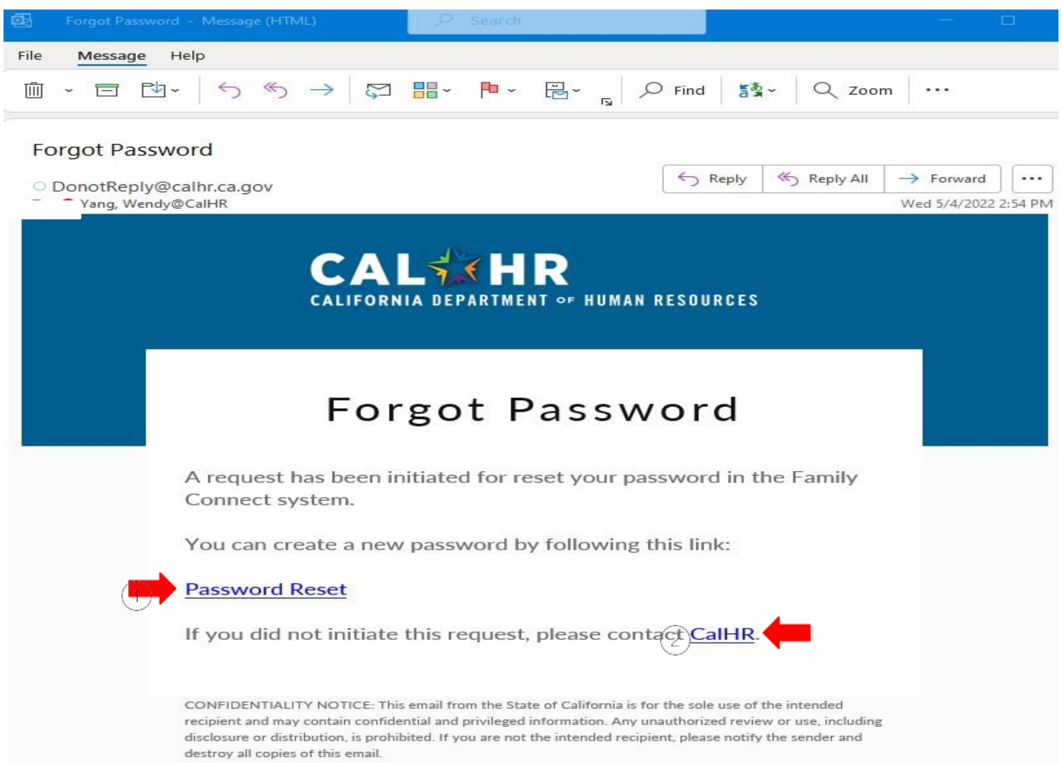
Step 4:

Once you have submitted your “Forgot Password” request, you will receive an email link to create a new password.



Step 5:

Select the **Password Reset** link in the email. If you did not initiate the Password Reset email, please contact CalHR’s DRV Unit by selecting the “CalHR” link.

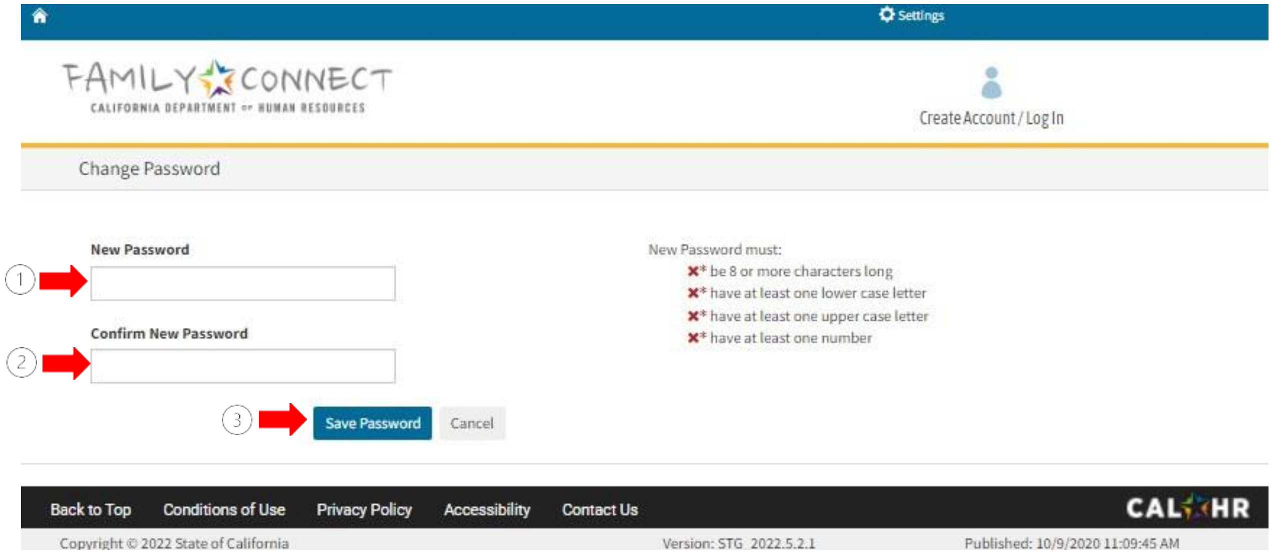


Step 6:

The **Change Password** screen is displayed.

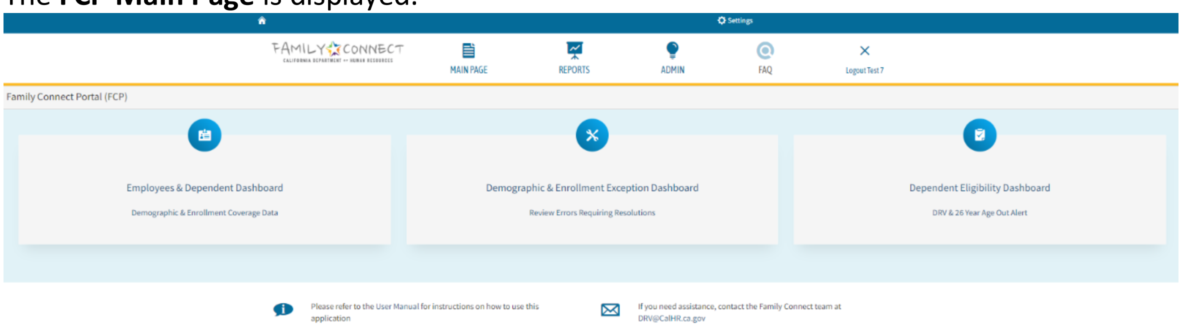
1. Enter your **New Password (see New Password requirements)**
2. Confirm your New **Password**

3. Select **Save Password** button



Step 7:

The **FCP Main Page** is displayed.



In addition, you will receive a **Changed Password** confirmation email.

This completes the Forgot/Reset Password process.

2.0 Admin Tab

The functionalities in the Admin Tab in FCP varies based on user type.

Manage Users for Dept Admin and VDHA Admin Users

Only Dept Admin and VDHA Admin users are authorized to manage pending Department User and/or VDHA user requests from the **Approve Pending Account** Requests, and to access a list of users for their agency using the **Manage Users** tab.

From the Manage Users tab, VDHA Admin users can view VDHA Admin and VDHA user roles only, while Dept Admin users can view more roles (Dept Admin, Department User, VDHA Admin and VDHA).

The list of VDHA Admin and VDHA users is used as a report that is shared with benefits carriers. The VDHA report is a list of authorized staff approved to contact benefit carriers to update employee and retiree vision, dental, and health benefits.

*CalHR administrators for FCP will provide a comprehensive list of VDHA users for all benefit carriers.

VDHA Admin users can 1) update their own account information, 2) approve pending VDHA account requests and 3) manage their department's VDHA users. In contrast, VDHA users can only update their own account information and view their individual information through the Manage Users report.

Dept Admin users can 1) update their account information, 2) approve pending **Department User** or **Department User and VDHA** accounts requests and 3) manage their Departments Users and VDHA. Whereas Department Users and VDHA roles can update their account information only and see their information on the Manage Users report.

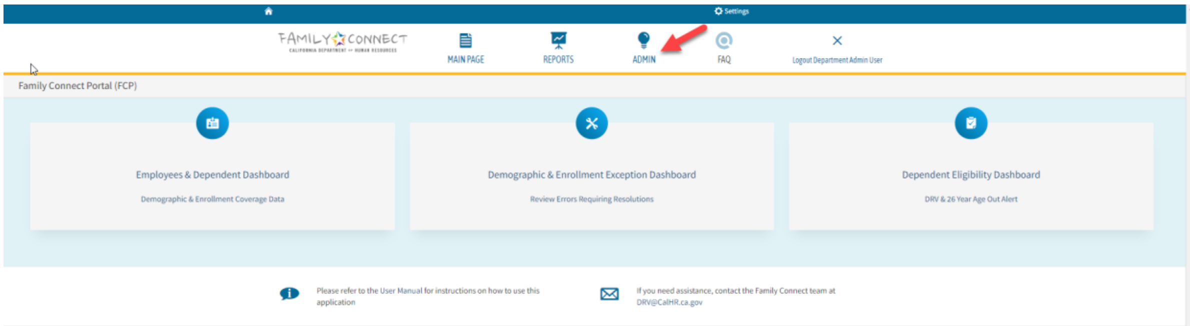
All users can access the **Modify My Account** icon.

Scenario: Review functions in the **Admin** tab.

Step Actions

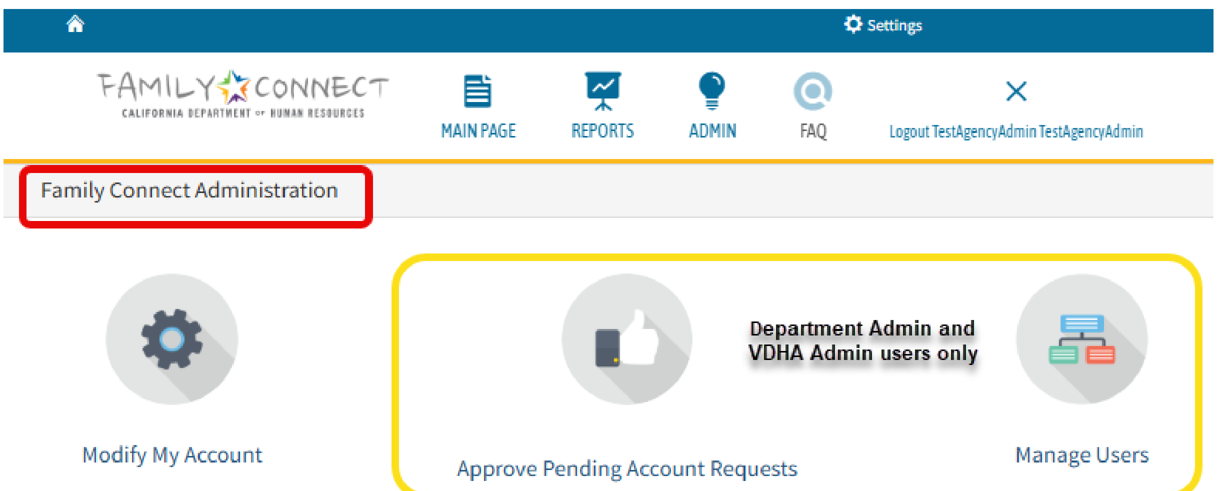
Step 1:

On the FCP Main Page, select the **Admin** tab. The **Family Connect Administration** page will display.



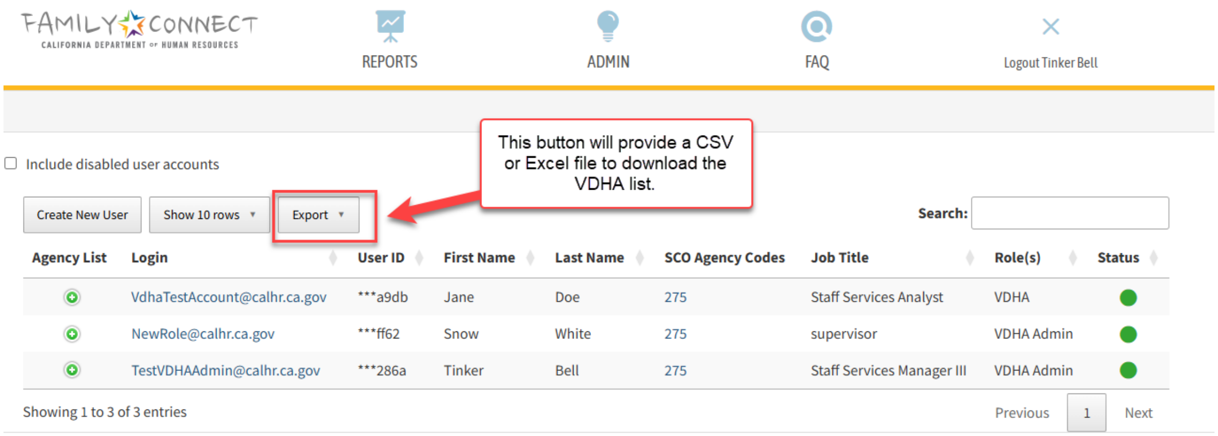
Step 2:

On the **Family Connect Portal Administration** page, the following reports are available:



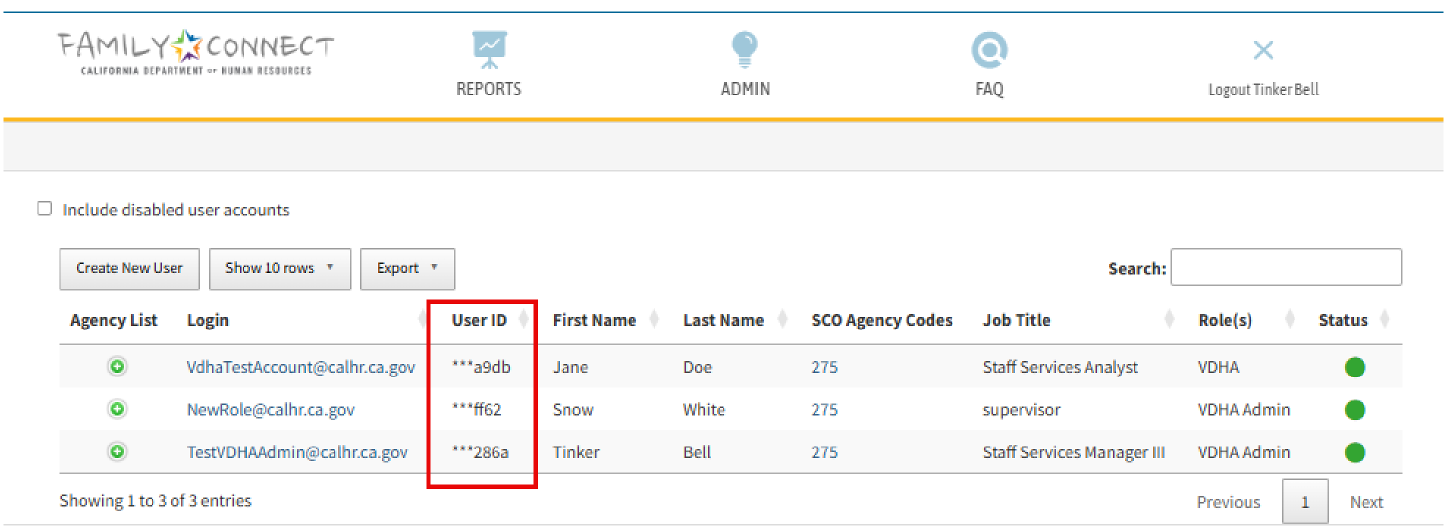
Step 3:

*__For VDHA Admin and VDHA users__: To download the **VDHA List** as a CSV or Excel file, click **Manage Users** report, then the Export button, as shown in the highlighted section below.



*Each authorized VDHA Admin or VDHA is assigned a unique User ID when their account is created. When contacting a carrier to discuss employee benefits—such as enrollments, changes, eligibility or terminations, the user must provide their User ID to verify their authorization to access or discuss employees' Personally Identifiable Information (PII).

Note: VDHA users can view and access their own contact information only.



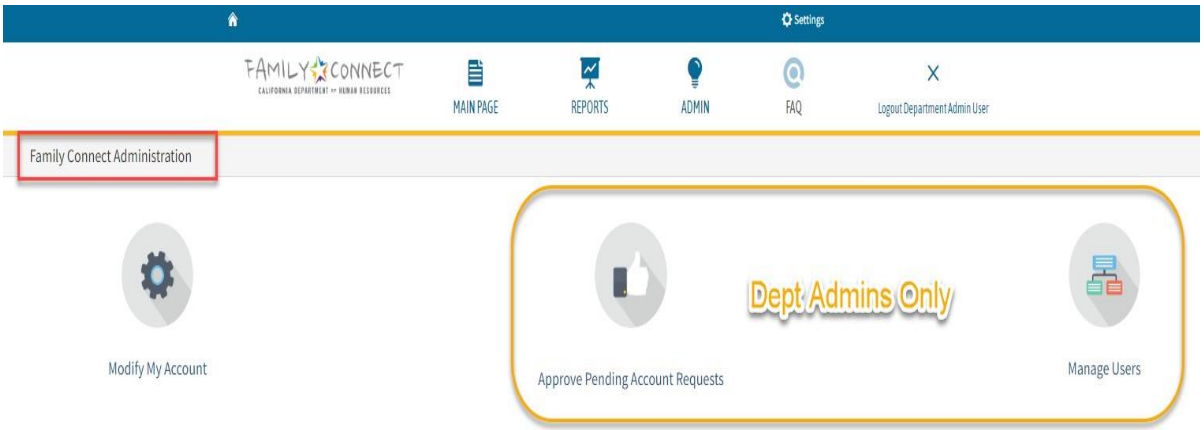
Modify My Account

Review the **Modify My Account** option.

Step Actions

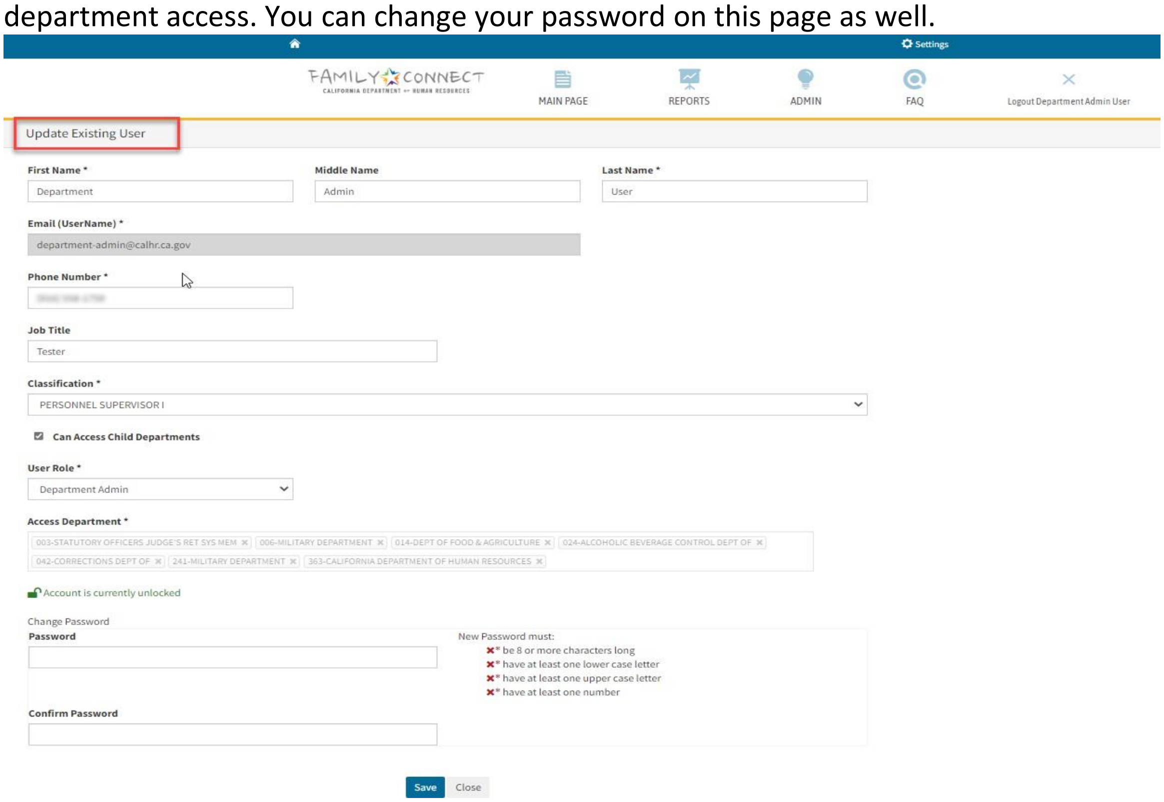
Step 1:

Click on the Admin Tab, and from the **Family Connect Administration** page, select the **Modify My Account** option. The Update Existing User page will display.



Step 2:

On the Update Existing User page, you can update all information except your Email (Username) and the department access. You can change your password on this page as well.



This completes the Modify My Account overview scenario.

Approve Pending Account Requests – Dept Admin and/or VDHA Admin Only

The following steps are outlined in the **Department User Account Review & Approval Process** section of this manual.

Manage Users – Dept Admin and/or VDHA Admin Only

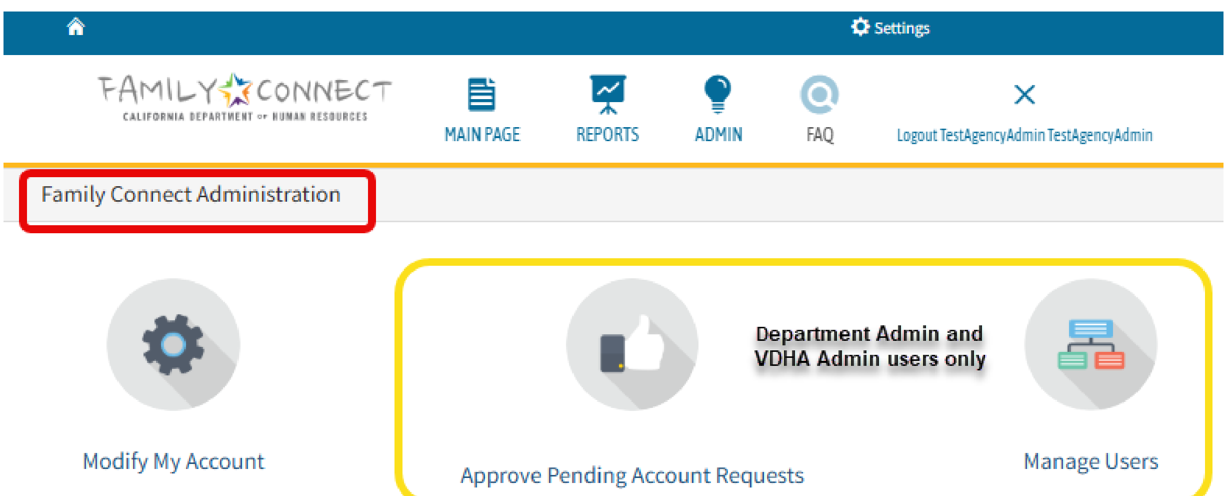
On the **Manage Users** page, the Dept Admin user can 1) deactivate an account user,
2) send a password reset email to **Department Users** or **Department User and VDHA** when needed and 3) create a new Department User or Department User and VDHA account.

Note: Dept Admin will approve users for DRV transactions that will be Department Users. They can also approve Department User or Department User and VDHA, as those users will be authorized to be on the VDHA list in addition to completing DRV transactions. Dept Admin will not approve VDHA only accounts.

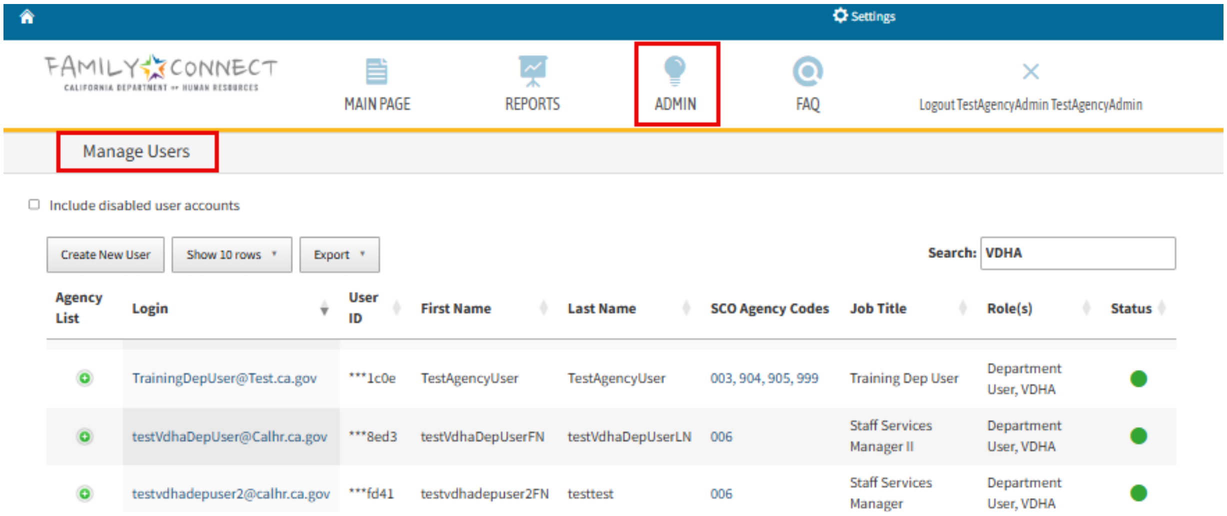
Review the **Account Deactivation and Password Reset** scenarios.

Step Actions

Step 1:
Click on the Admin Tab, and from the **Family Connect Administration** page, select the **Manage Users** option. The Manage Users page will display.



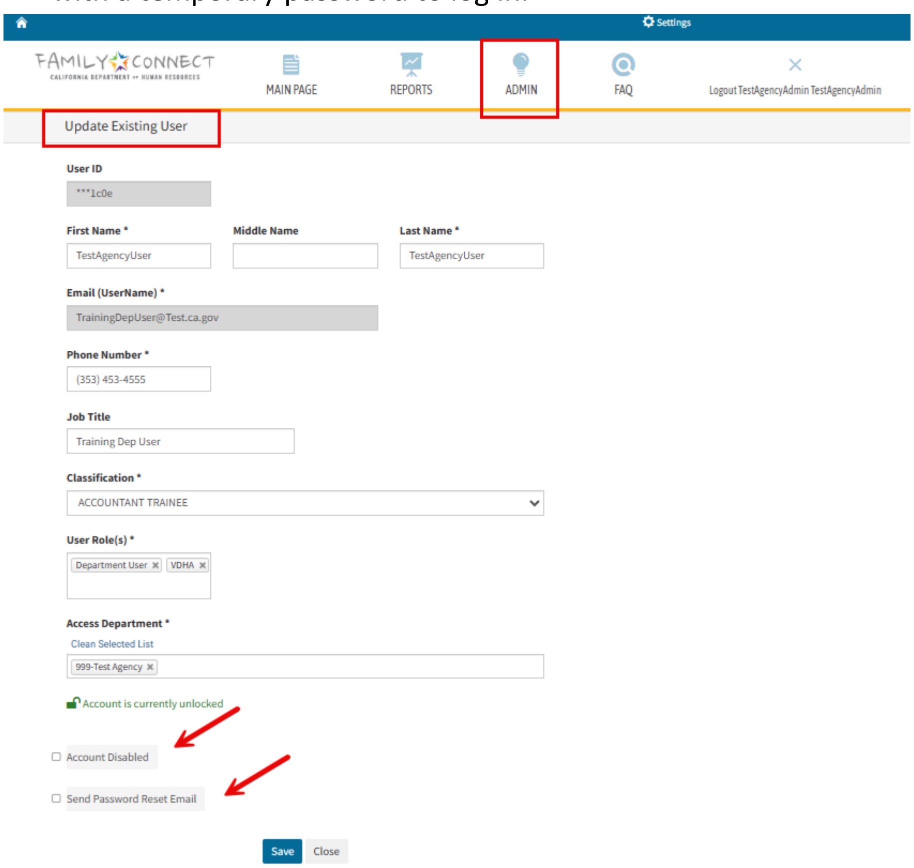
Step 2:
On the **Manage Users** page, click on account user's Login name. The **Update Existing User** page will display.



Step 3:

On the Update Existing User page, select the checkbox next to “Account Disabled” or “Send Password Reset Email” and Save.

- Account Disabled selection: The account is now disabled, and the account user is unable to log in.
- Password Reset selection: The system will send an email to the account user and provide them with a temporary password to log in.



This completes Account deactivation and Password Reset scenarios.

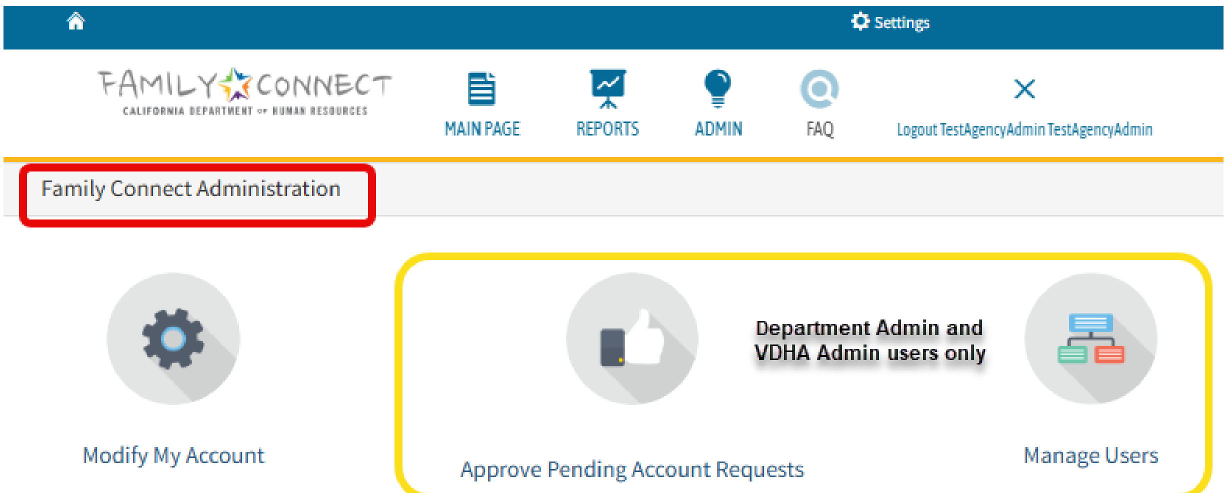
Review the **Create New User** account scenario.

Dept Admin users can create new Department User or Department User and VDHA accounts. If your department has identified a new Dept Admin user, their account request must be submitted from the FCP log in page.

Step Actions

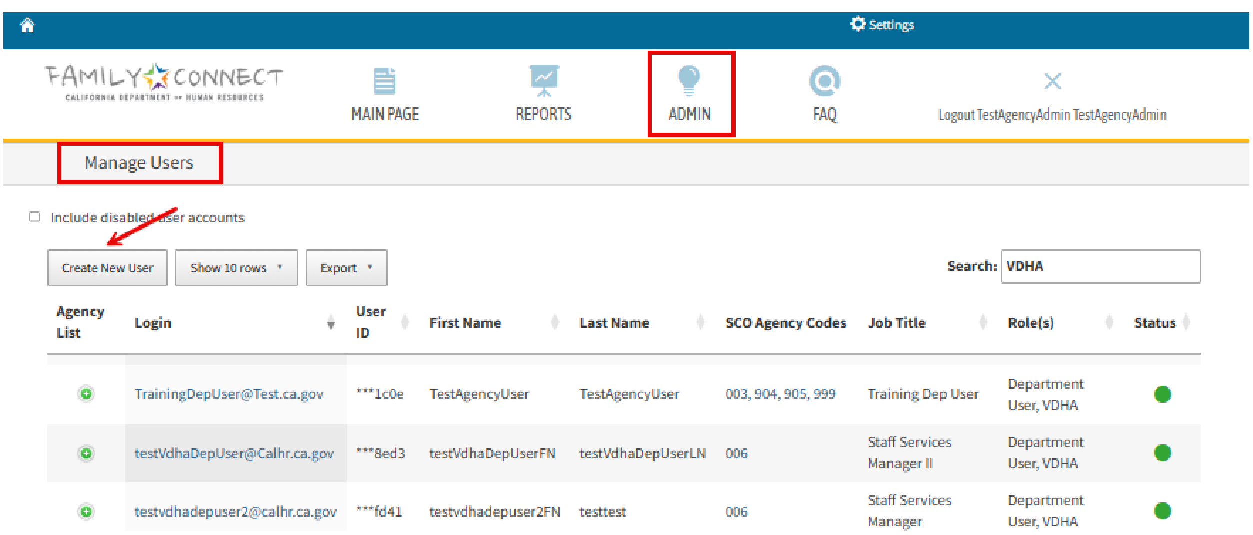
Step 1:

Click on the Admin Tab, and from the **Family Connect Administration** page, select the **Manage Users** option. The Manage Users page will display.



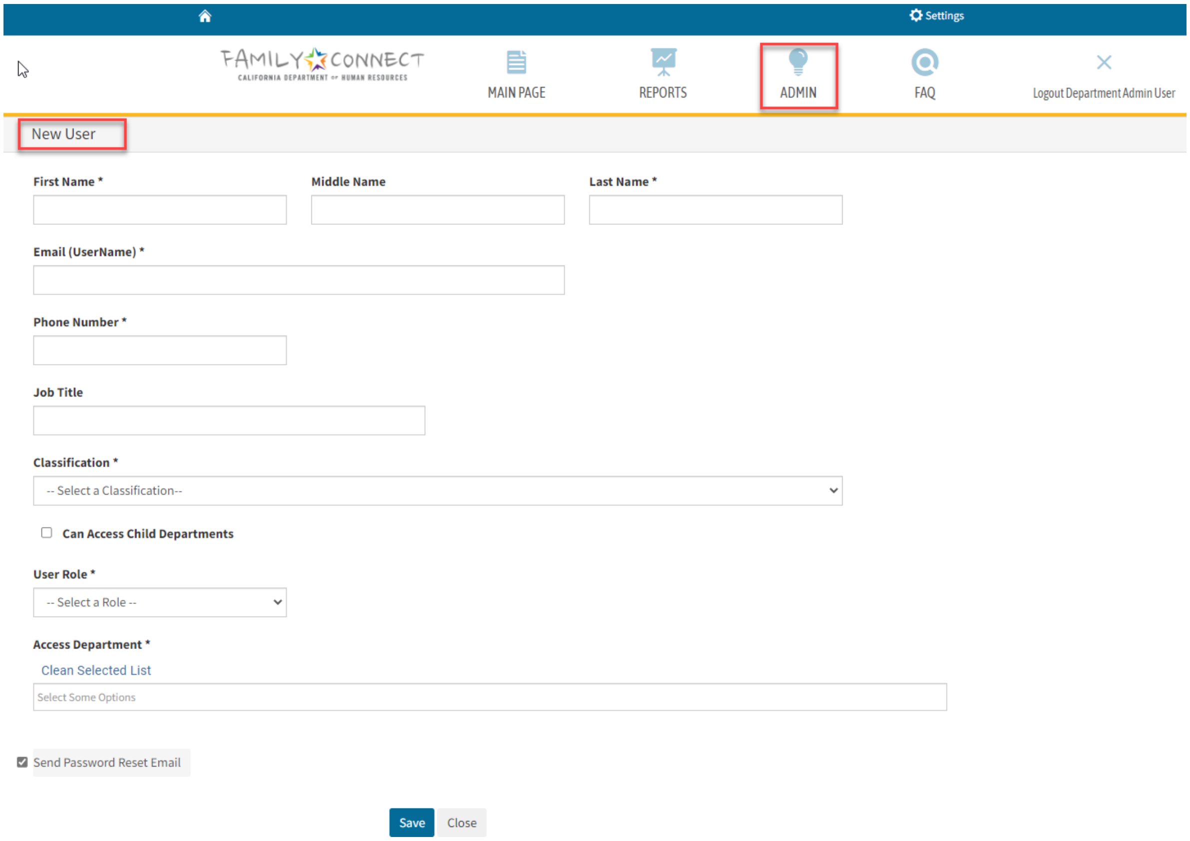
Step 2:

On the **Manage Users** page, click on **Create New User** button. The **New User** page will display.



Step 3:

On the **New User** page, enter all required information and Save.The system will send an email to the account user and provide them with a temporary password to log in.

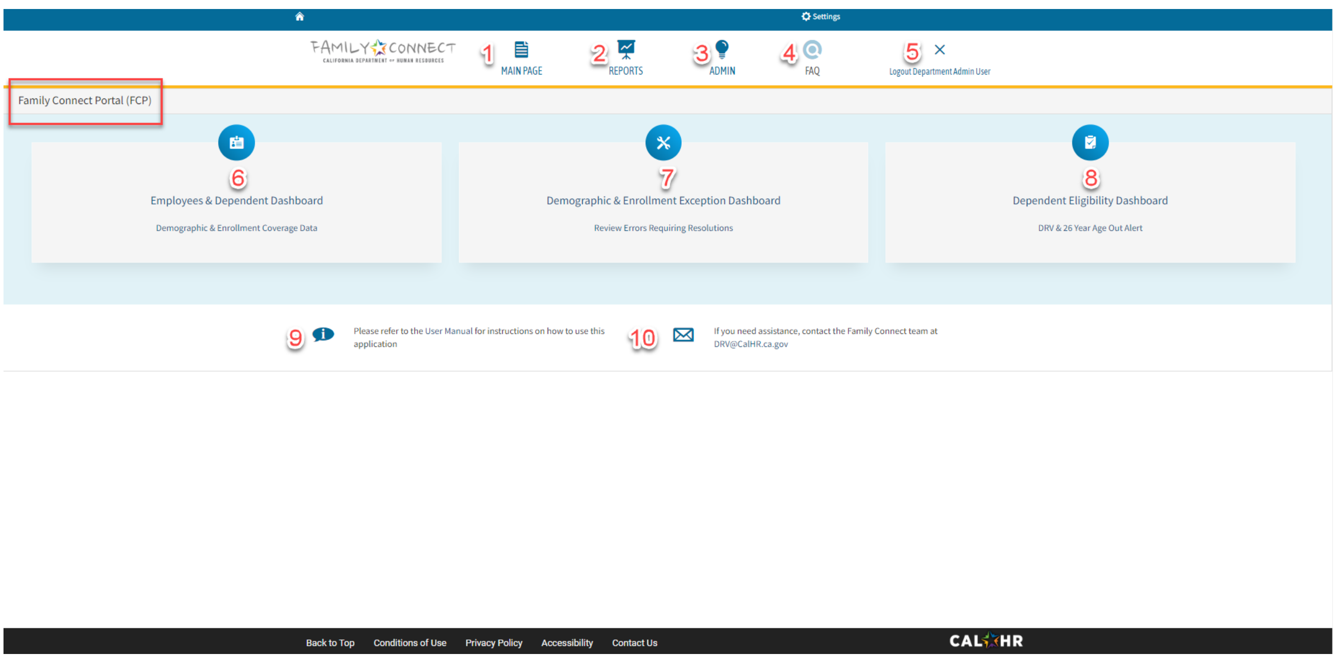


This completes the Create New User account scenario.

3.0 FCP Main Page Overview

The FCP Main Page is the FCP's home page. On the Main Page you have the following options:

1. Main Page Tab (Home Page)
2. Reports Tab
3. Admin Tab
4. FAQ
5. Logout
6. Employees & Dependent Dashboard
7. Demographic & Enrollment Exception Dashboard
8. Dependent Eligibility Dashboard
9. User Manual
10. DRV/FCP Contact



4.0 FCP Dashboards

There are three Dashboards in FCP:

1. Employees & Dependents Dashboard
2. Demographic and Enrollment Exception Dashboard
3. Dependent Eligibility Dashboard

All Employee accounts (active and inactive) are stored or filed in the **Employees & Dependent Dashboard.**

If FCP receives a carrier/vendor file for an employee or dependent with demographic information that doesn't match the information in FCP that was provided by SCO, then:

1. FCP will move the employee's account/file from the Employees & Dependent Dashboard to the Demographic & Enrollment Exception Dashboard
2. The employee's account will remain in the Demographic & Enrollment Exception Dashboard until the Exception is resolved

Once the Exception is resolved, the employee's account is moved back to the Employees & Dependent Dashboard.

Employees and Dependents Dashboard

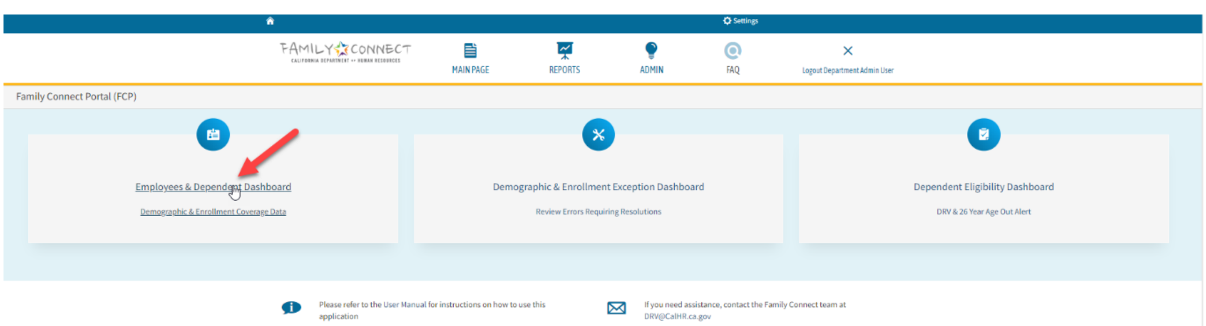
The Employees & Dependents Dashboard contains accounts of all employees who currently do not have a demographic & enrollment exception/error. Each employee is assigned an identification number (UEID). It is the same unique employee identification number that is used by the State Controller's Office (SCO).

Scenario: Review Employee and Dependent information in the Employees & Dependents Dashboard.

Step Actions

Step 1

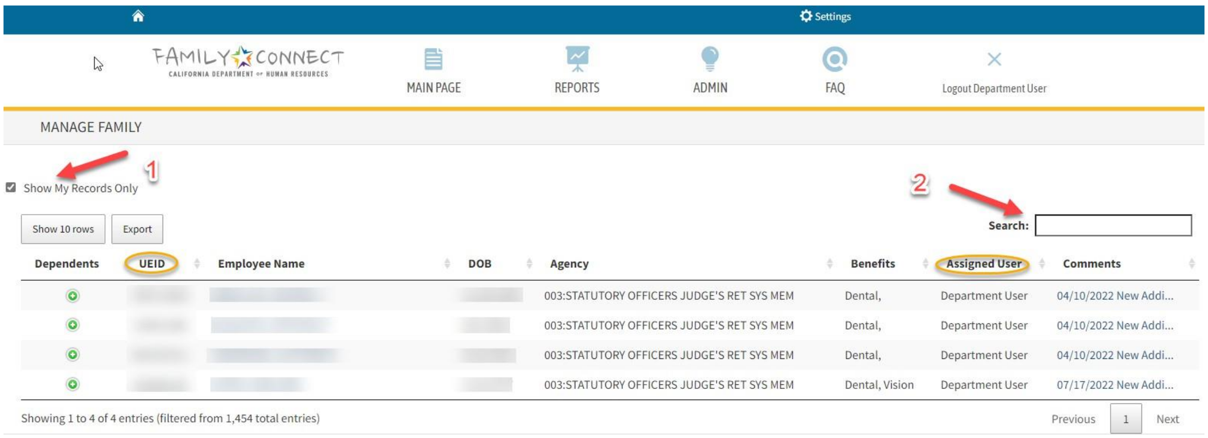
On the FCP Main Page, select the **Employees & Dependent Dashboard** tab. The Manage Family page displays.



Step 2:

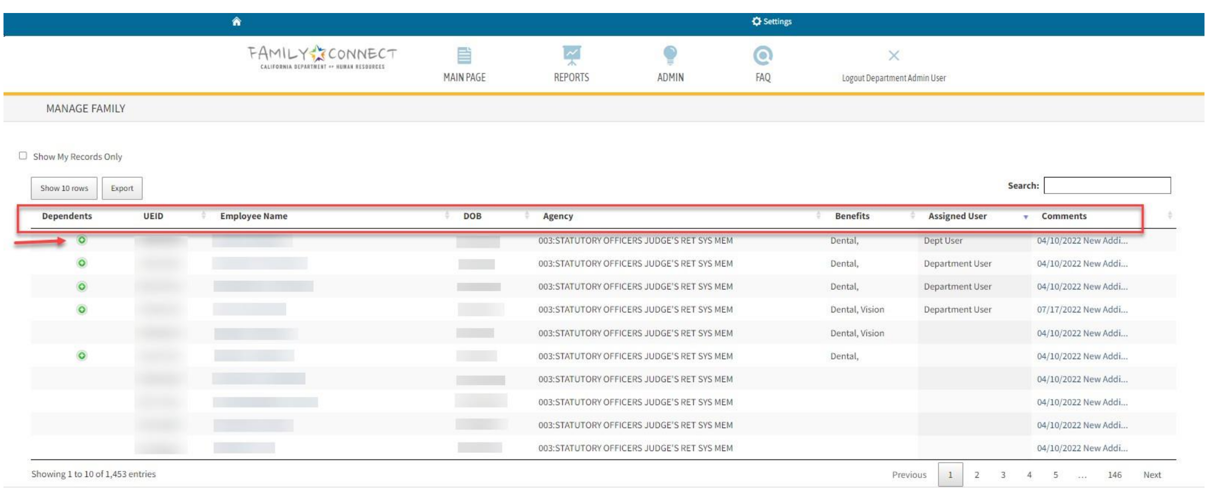
On the **Manage Family** page, the "Show My Records Only" (1) is defaulted to yes with a checkmark. You can uncheck this box to see all employee accounts (assigned to you, unassigned or assigned to another FCP user within your department). You can also export a list of employees into Excel or search for an employee account by using the Search box (2). You can view the name of the user the account is assigned to under the “Assigned User” column. If the account is unassigned, that field will be blank.

Note: The Employees & Dependent Dashboard also includes inactive employee accounts where the employee is not currently enrolled in dental or premier vision.



Step 3:

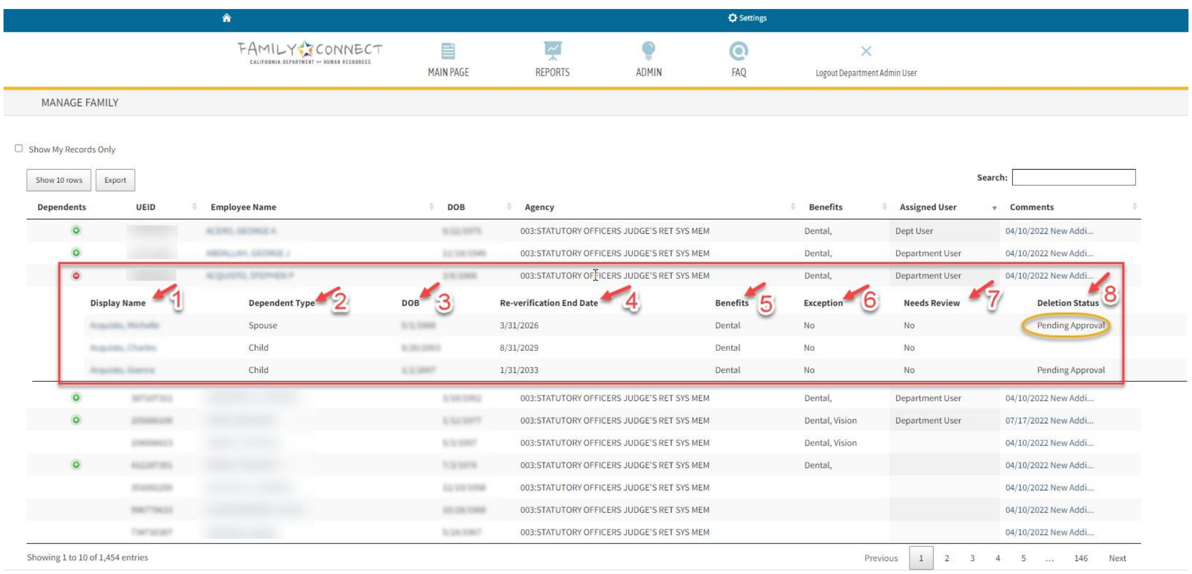
Review Employee Accounts. For a quick view of an employee's dependent(s), click on the **green plus button** in the Dependents column. The **Dependents** list panel will display.



Step 4:

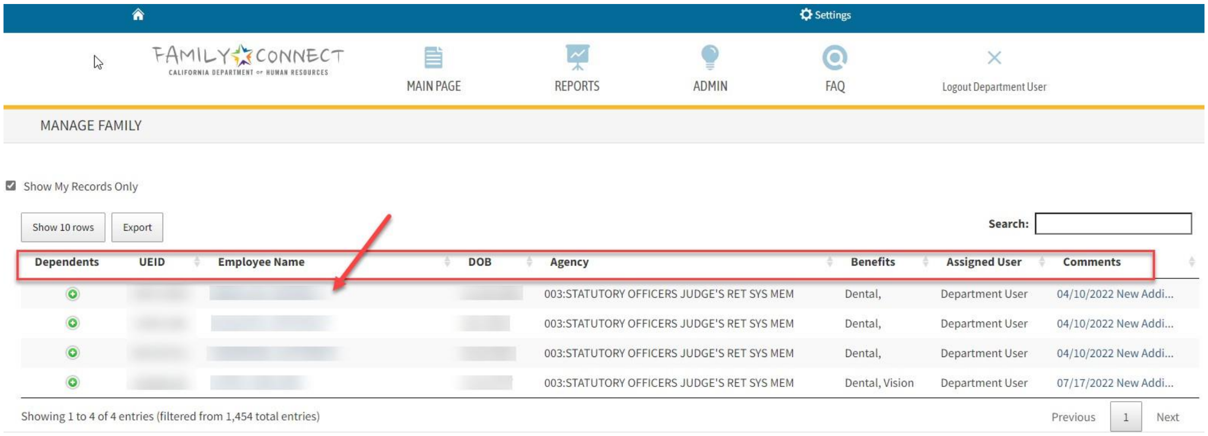
Review the list of employee's dependent(s).

1. **Display Name:** Shows the full name of each dependent
2. **Dependent Type:** Shows the relationship type - child (includes both natural and adopted children), spouse, domestic partner, stepchild, and domestic partner child
3. **DOB:** Each dependent's full date of birth
4. **Re-Verification End Date:** When each dependent's current re-verification period ends
5. **Benefits:** Will list whichever benefits they are enrolled in - Dental and/or Vision
6. **Exception:** Yes/No – indicates if there is an error on their account
7. **Needs Review:** Yes/No - indicating DRV and/or the 26-year-old alert
8. **Deletion Status:** If a Department User had submitted a dependent deletion request, this will display "Pending Approval". Otherwise, this field will be blank



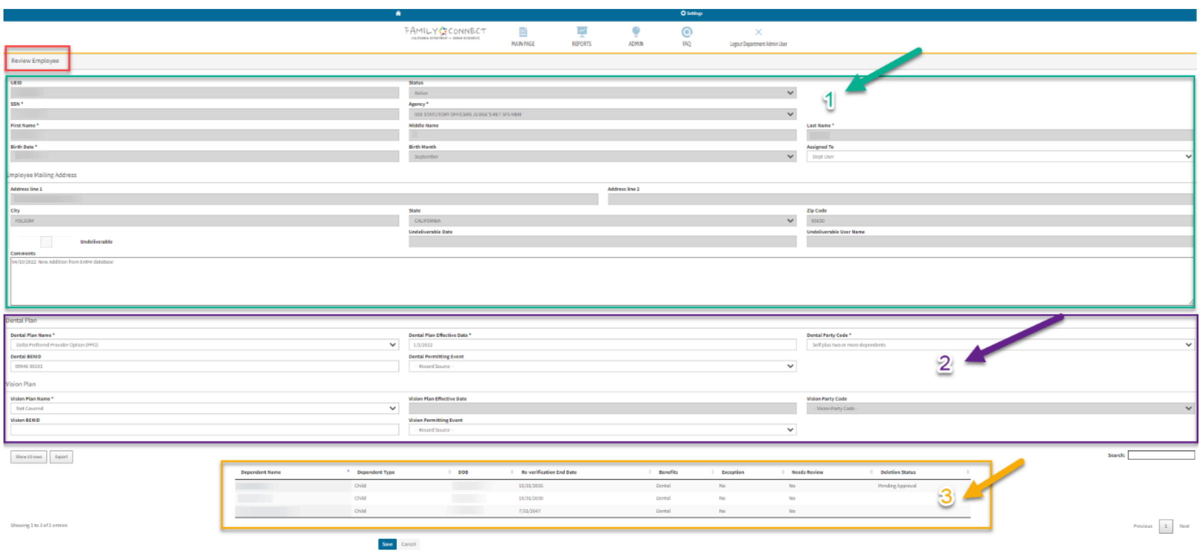
Step 5:

Click on the Employee's name to review the employee's demographic and benefit enrollment information as well as all dependent information. The **Review Employee** page will display.

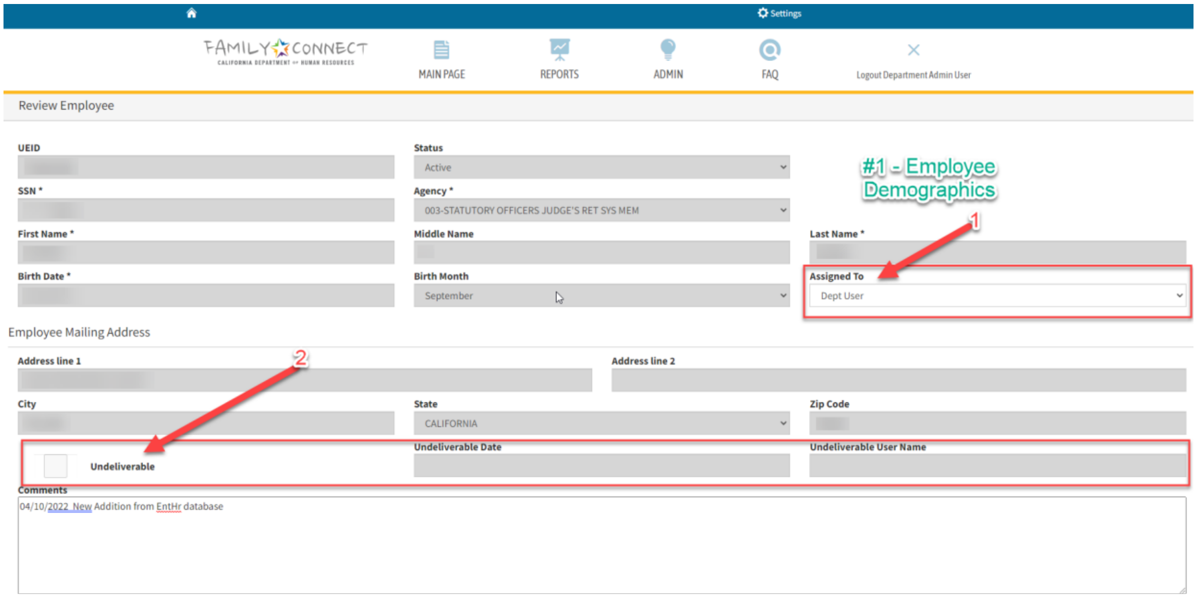


Step 6:

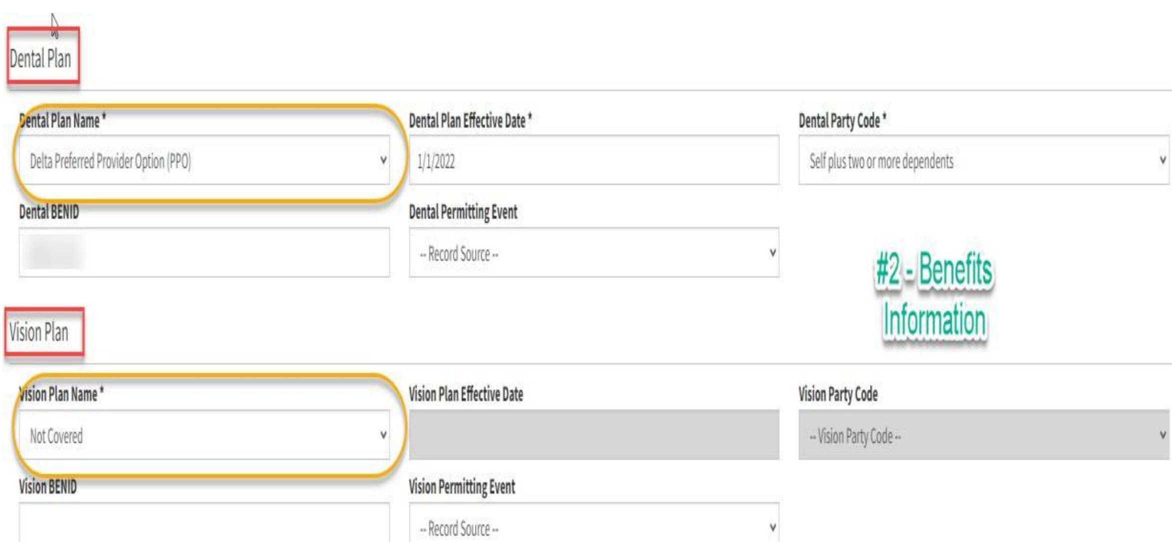
The **Review Employee** page is divided into three sections.



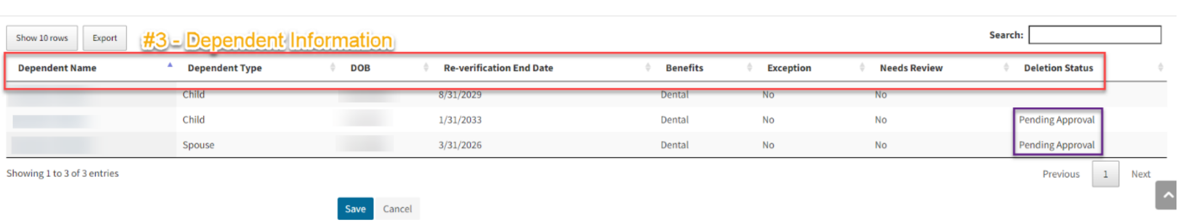
Section 1: Employee demographics



Section 2: Benefits Enrollment Information

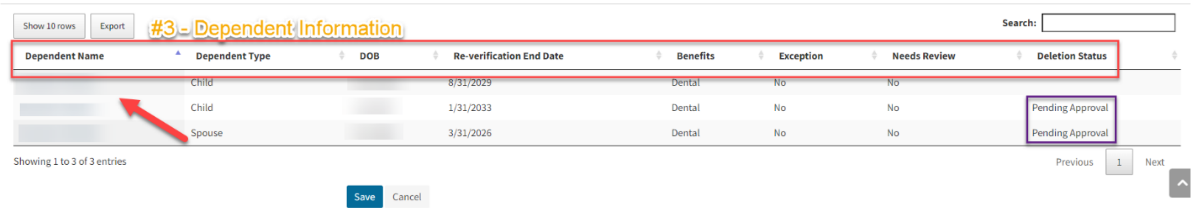


Section 3: Dependent Information



Step 7:

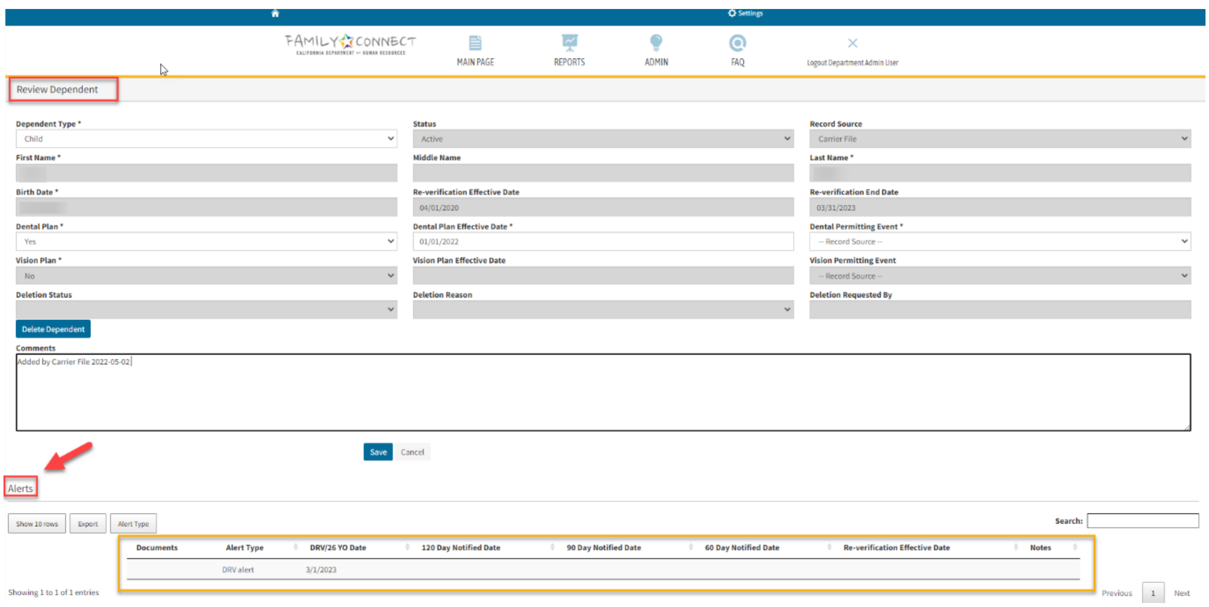
Select the dependent's name to review each dependent's information. The **Review Dependent** page displays.



Step 8:

Ensure that the dependent information is correct. If the dependent type is incorrect, select the correct dependent type from the drop-down menu and save the update. Next, update the dependent type and any other information directly with the vendor(s). The "Dependent Type" information is used for re-verification purposes.

The Alerts panel will indicate if the dependent is pending re-verification and/or if they are nearing age 26.



This completes the Employees & Dependent Dashboard review scenario.

Demographic and Enrollment Exception Dashboard

The Demographic & Enrollment Exception Dashboard contains active and inactive employee accounts with errors.

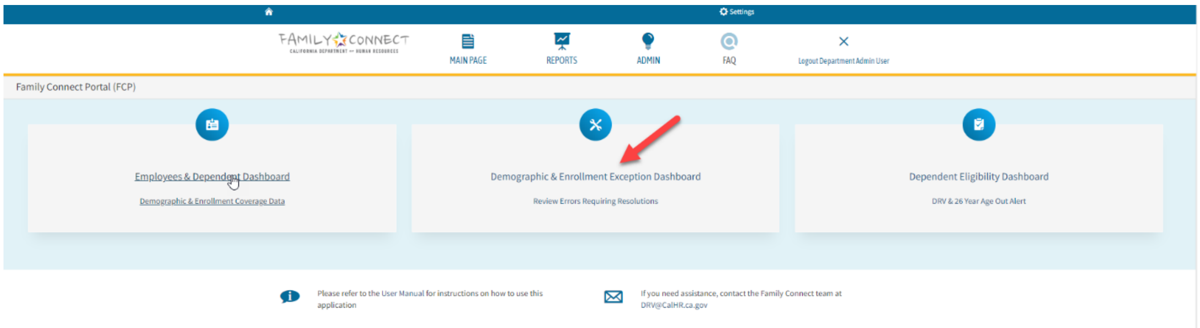
The employee's account is updated when FCP receives a vendor file for that employee or their dependent with demographic information that doesn't match the information in FCP that was provided by SCO

Scenario: Review error/exception information in the Demographic & Enrollment Exception Dashboard.

Step Actions

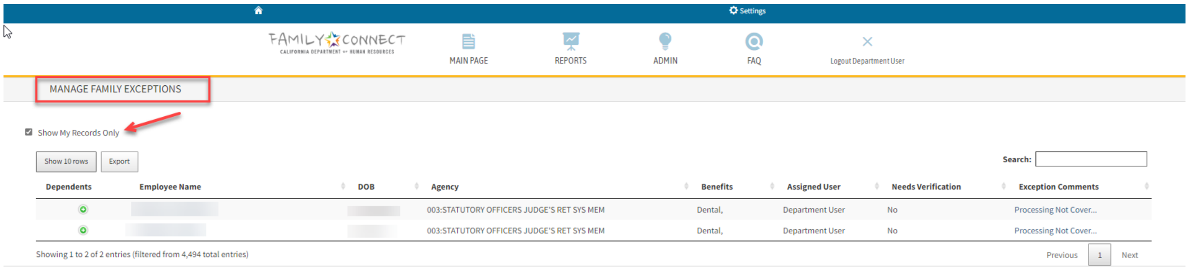
Step 1:

On the FCP Main Page, select the **Demographic & Enrollment Exception Dashboard** tab. The Manage Family Exceptions page displays.



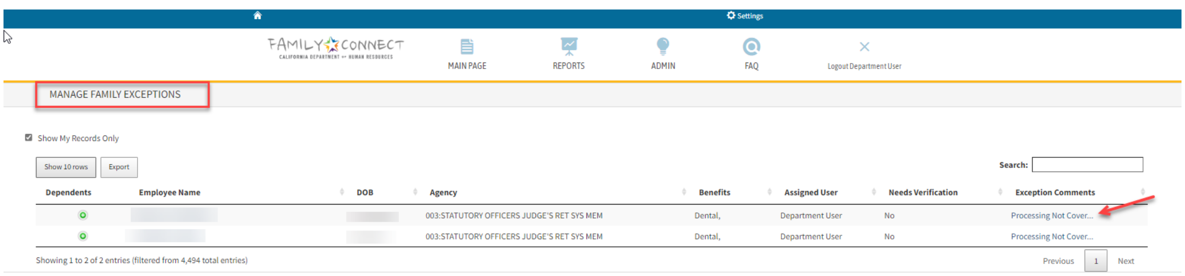
Step 2:

On the **Manage Family Exceptions** page, the "Show My Records Only" is defaulted to yes with a checkmark. You can uncheck this box to see all employee accounts (assigned to you, unassigned or assigned to another HR personnel within your department).



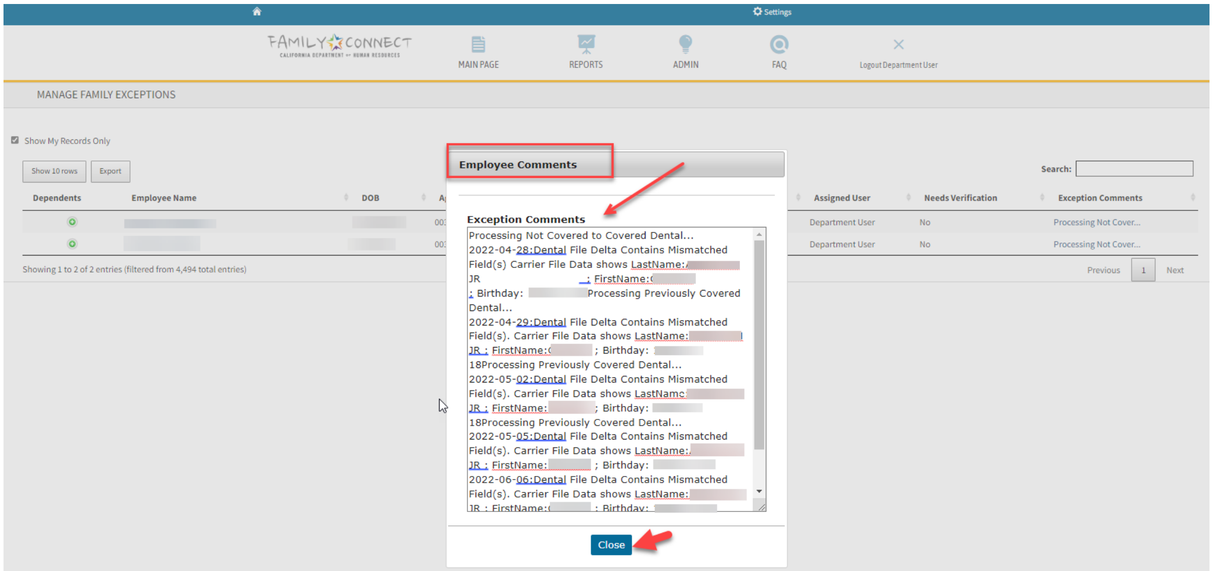
Step 3:

Select the **Exception Comments** link on this page to quickly review the error/exception issue on an employee's account. The **Employee Comments** pop up box is displayed.



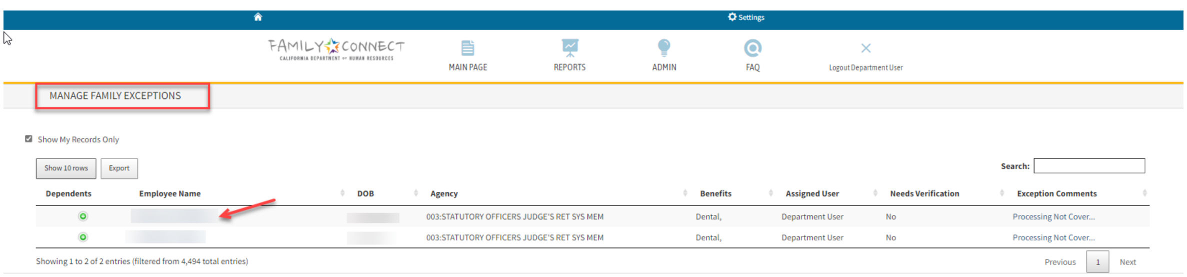
Step 4:

Review the exception message. The Employee Comments pop up box will list the type(s) of errors that exist on the employee or the dependent's account. Select the close button to exit out of the Employee Comments pop up box.



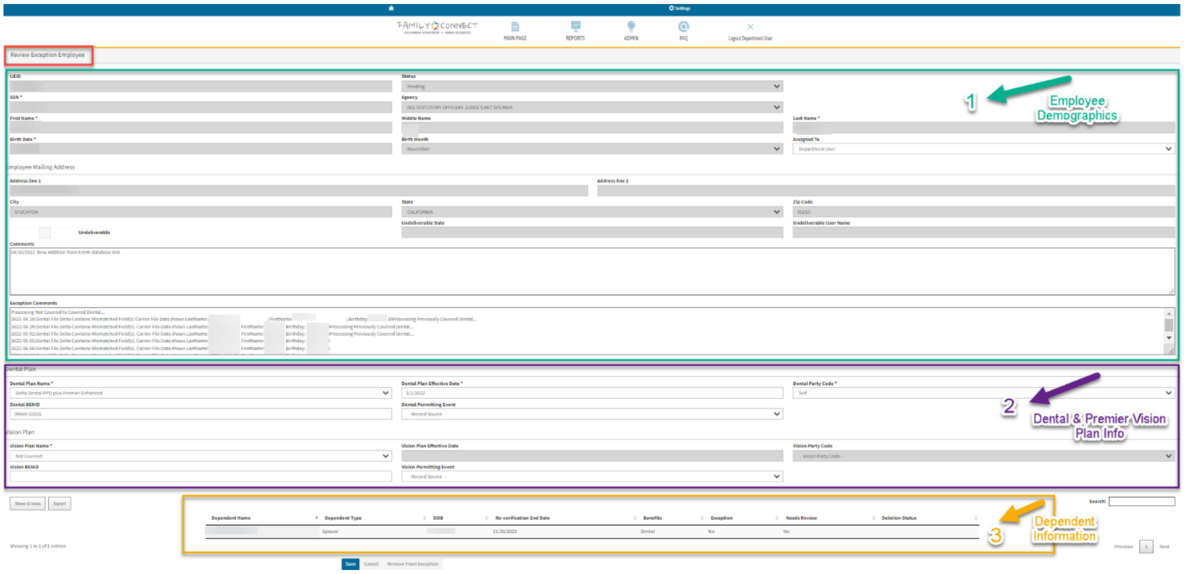
Step 5:

Click on the Employee's name to review the employee's and/or dependent's exception information. The **Review Exception Employee** page will display.



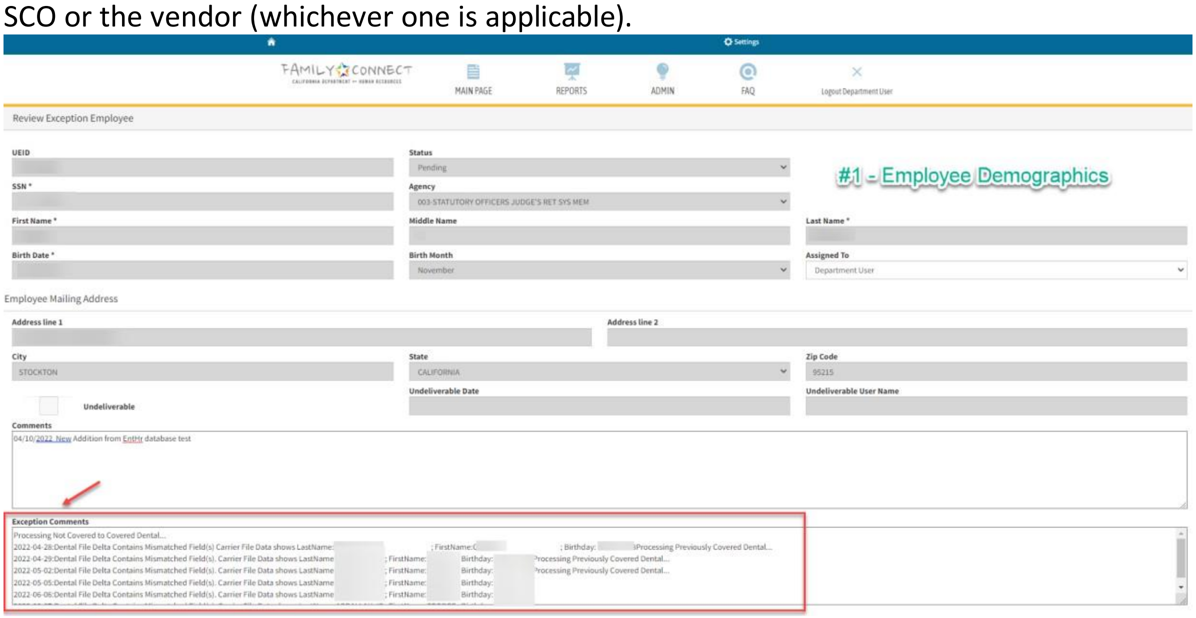
Step 6:

The **Review Exception Employee** page is divided into three sections.

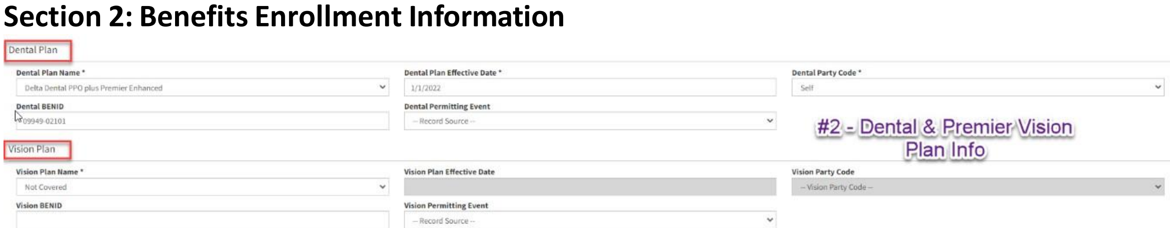


Section 1: Employee demographics

In this section, the Exception Comments box will list all the errors on the employee and/or dependent's account(s). Review all sections and make necessary corrections on the employee's account directly with SCO or the vendor (whichever one is applicable).



Section 2: Benefits Enrollment Information



Section 3: Dependent Information

Step 7:

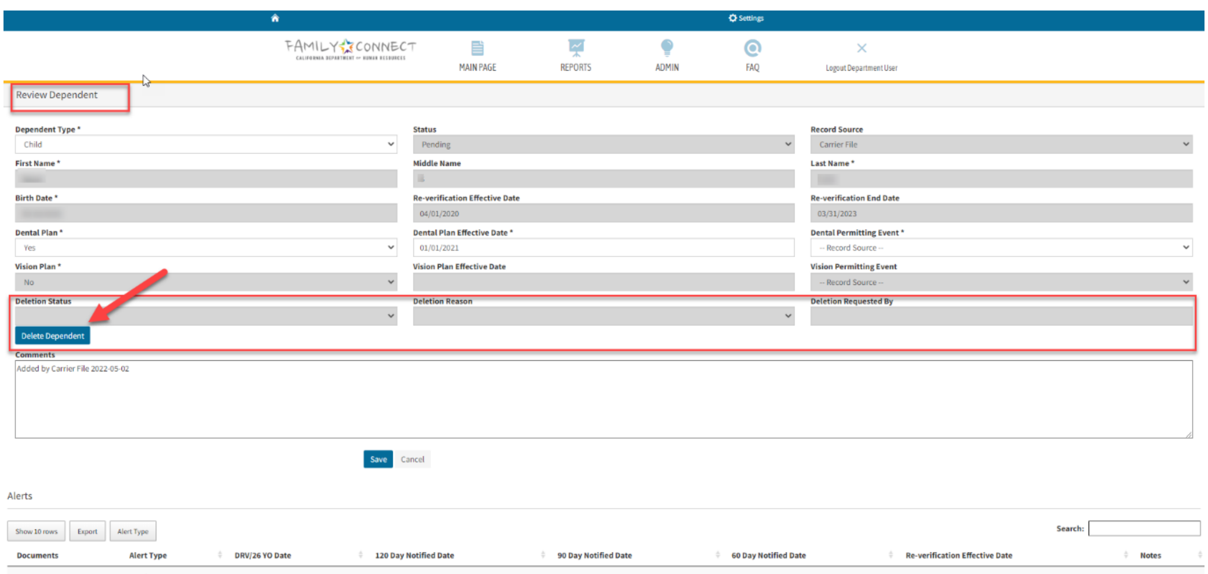
If the exception/error is on the dependent's account, then select the dependent's name to review the dependent's information. The **Review Dependent** page will display.

Step 8a:

Review the dependent's information. If the exception/error is on the dependent's account, then you will have to delete the dependent from FCP only if the exception message provided by the vendor matches at least one of the "Deletion Reasons" listed in the Deletion Reason Drop Down menu:

1. Duplicate Dependent
2. Incorrect Date of Birth
3. Incorrect First Name
4. Incorrect Last Name
5. Ineligible Dependent
6. Not a Dependent of Employee

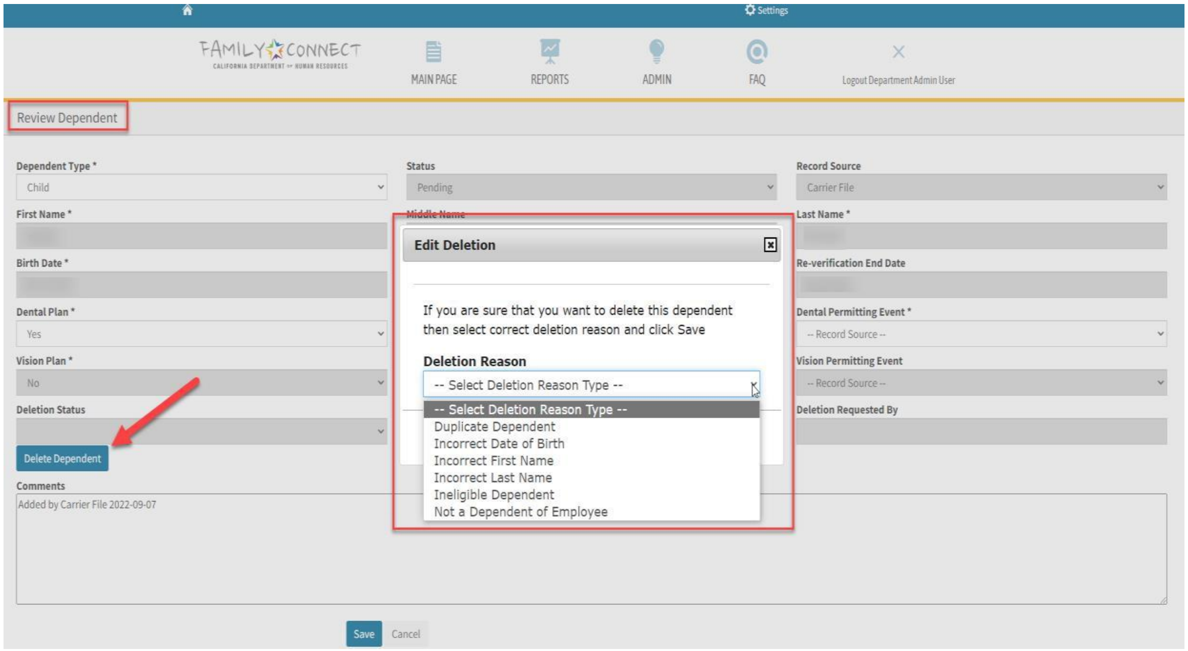
To delete the dependent, select the **Delete button**.



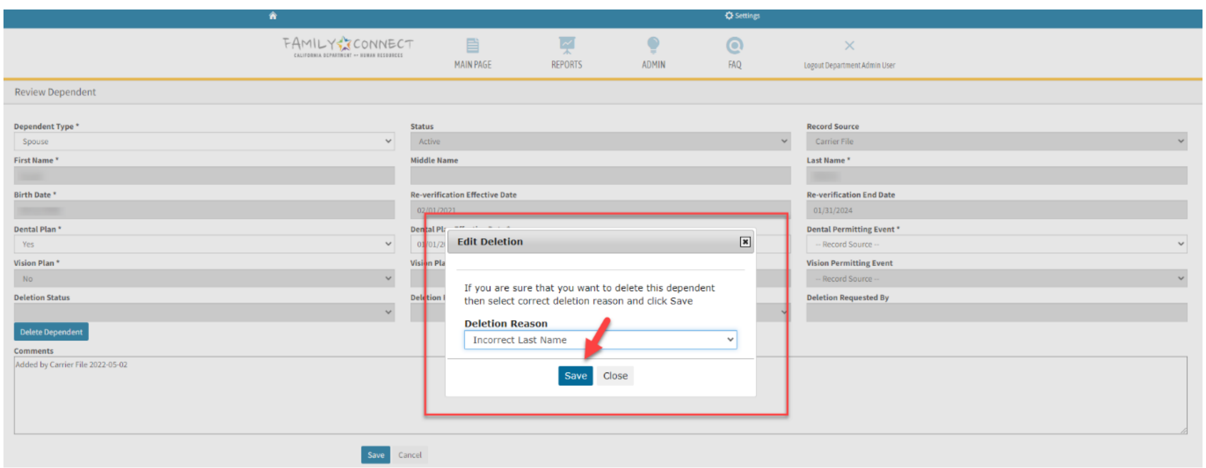
Step 8b:

Once you select the **Delete Dependent** button, the **Edit Deletion** pop up box is displayed. Select the

Deletion Reason from the dropdown menu.



Step 8c:
Select **Save.**

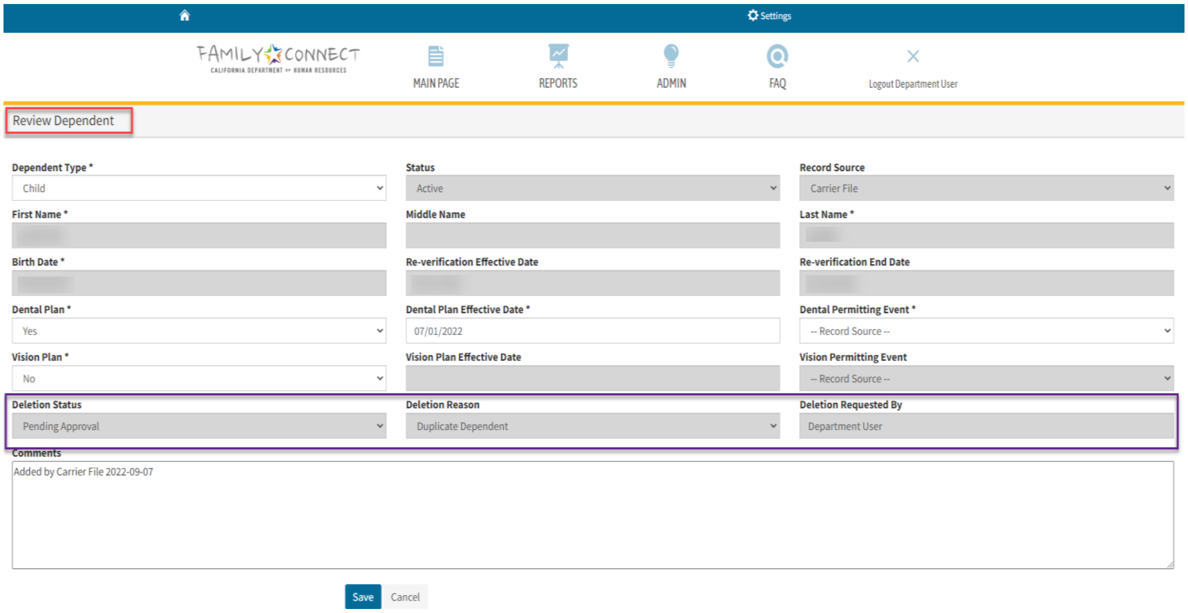


Step 8d:

A dependent deletion processed in FCP by a Department User or a Dept Admin user is processed automatically, and the Department User will be returned to the **Review Exception Employee** page.

Step 8e:

A dependent deletion processed in FCP by a Department User is not deleted automatically. The dependent deletion request is sent to the Dept Admin user for a final review and approval. Once the dependent is deleted, the Department User is returned to the Review Dependent page. The Department User's deletion request will be listed as Pending Approval.



Step 9:

Departmental personnel offices must contact the vendor and/or SCO and request necessary corrections to the dependent's information.

Step 10:

Once you have reviewed the exception(s) and taken all necessary steps to correct the employee and/or dependent information, including deleting a dependent from FCP (if applicable), return to the **Review Exception Employee** page and select the **Remove From Exception** button.

The **Exception Comment** will be removed from the employee's account, and the account is moved back to the **Employees and Dependent Dashboard**.

Step 11:

A future file transfer from the vendor and/or SCO will reestablish the deleted dependent with the correct information (if applicable).

This completes the Demographic and Enrollment Exception Dashboard review scenario.

Dependent Eligibility Dashboard

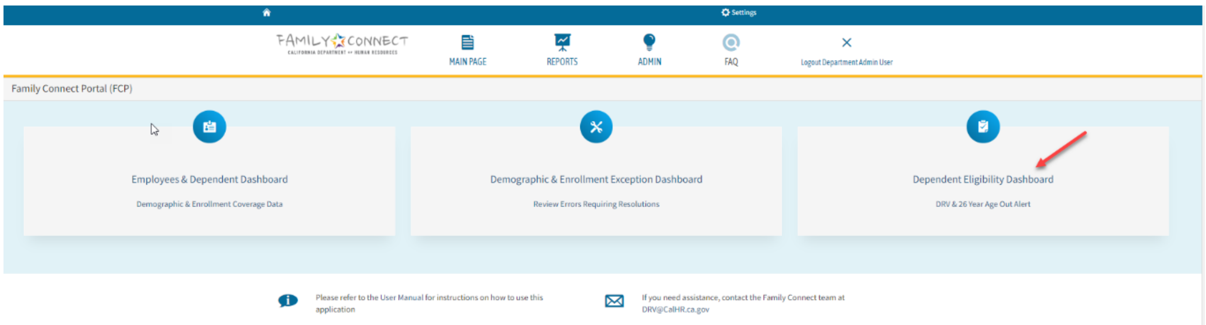
The **Dependent Eligibility Dashboard** contains accounts of all employees with dependent(s) who require re-verification based on the DRV schedule and/or have dependent child(ren) who are within 0-4 months of nearing age 26.

Scenario: Overview of the **Dependent Eligibility Dashboard**.

Step Actions

Step 1:

On the FCP Main Page, select the **Dependent Eligibility Dashboard** tab. The **Dependent Eligibility Dashboard** page will display.

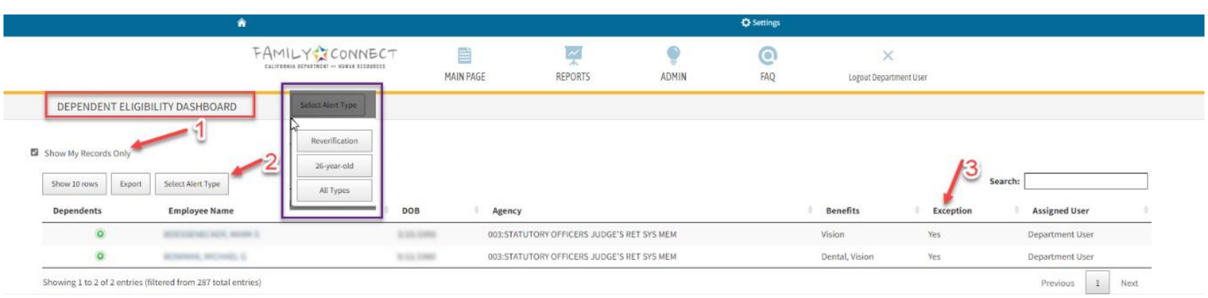


Step 2:

On the **Dependent Eligibility Dashboard** page, the "Show My Records Only" (#1) is defaulted to yes with a checkmark. You can uncheck this box to see all employee accounts (assigned to you, unassigned or assigned to another HR personnel within your department).

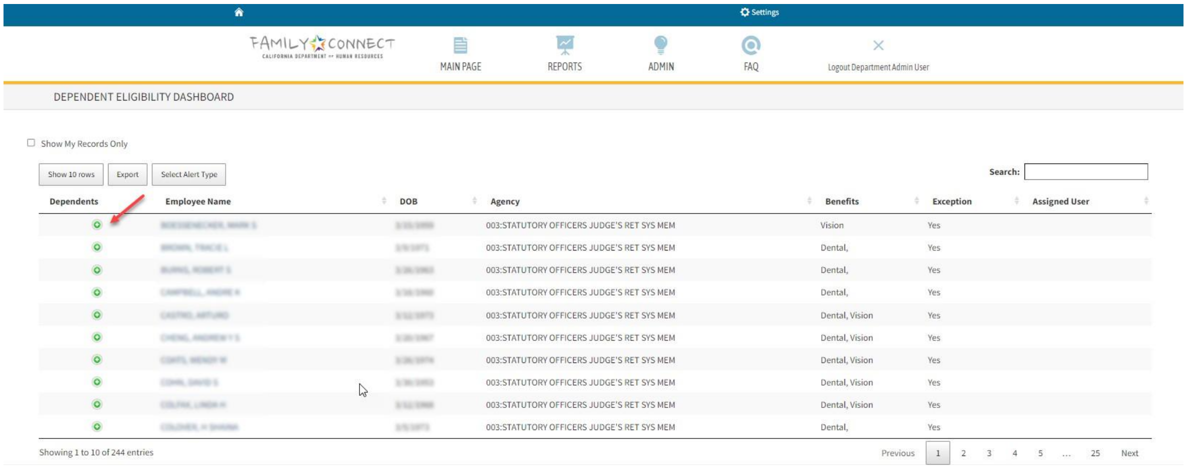
In this Dashboard, by default, a combination of all employees with dependents who require re-verification as well as all employees with dependents who are nearing age 26 will be listed. You have the option to filter by alert type by clicking on the **Select Alert Type** button (#2). This will give you three options: Reverification, 26-year-old, and All types.

In addition, in this Dashboard, the **Exception** column (#3) will have a **Yes/No** value depending on whether there are any exceptions/errors on this employee's account. If the Exception column indicates Yes, then this employee's account is also in the **Demographic and Enrollment Exceptions Dashboard** and requires corrective action(s).



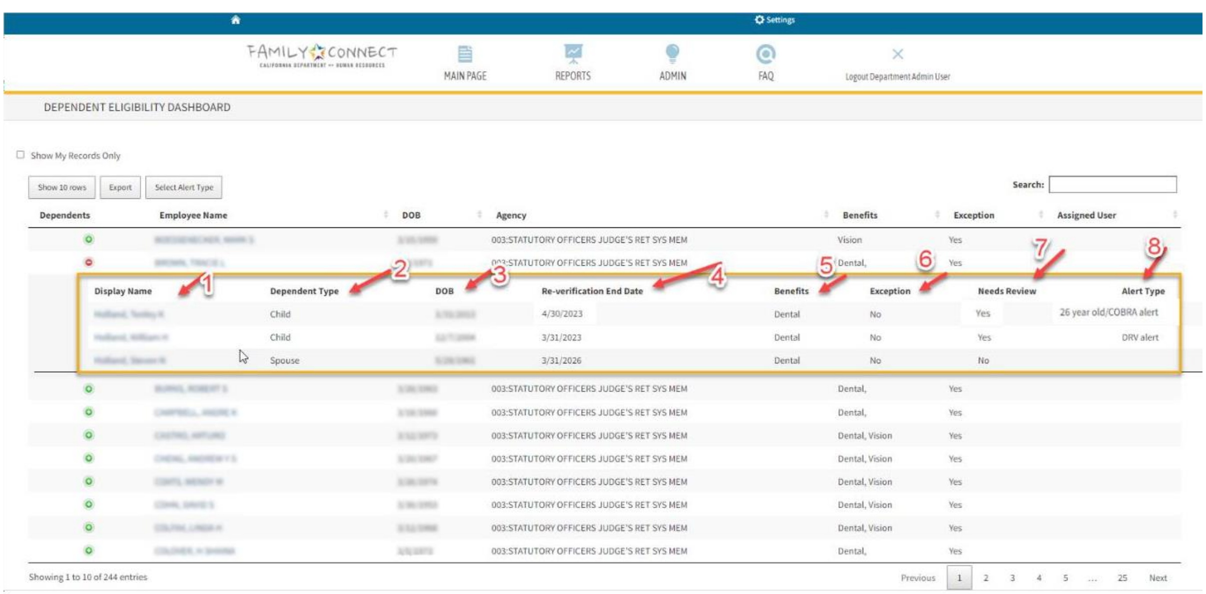
Step 3:

For a quick view of an employee's dependent(s), click on the **green plus button** in the Dependents column. The **Dependents** list panel will display.



Step 4:
Review the list of employee's dependent(s).

1. **Display Name:** Shows the full name of each dependent
2. **Dependent Type:** Shows the relationship type - child (includes both natural and adopted children), spouse, domestic partner, stepchild, and domestic partner child
3. **DOB**: Displays dependent's full date of birth
4. **Re-Verification End Date:** When each dependent's current re-verification period ends
5. **Benefits:** Dental and/or Vision
6. **Exception:** Yes/No - account error
7. **Needs Review:** Yes/No - indicating DRV or 26-year-old alert
8. **Alert Type:** DRV or 26-year-old alert



This completes the Dependent Eligibility Dashboard overview scenario.

5.0 Dependent Re-Verification Process

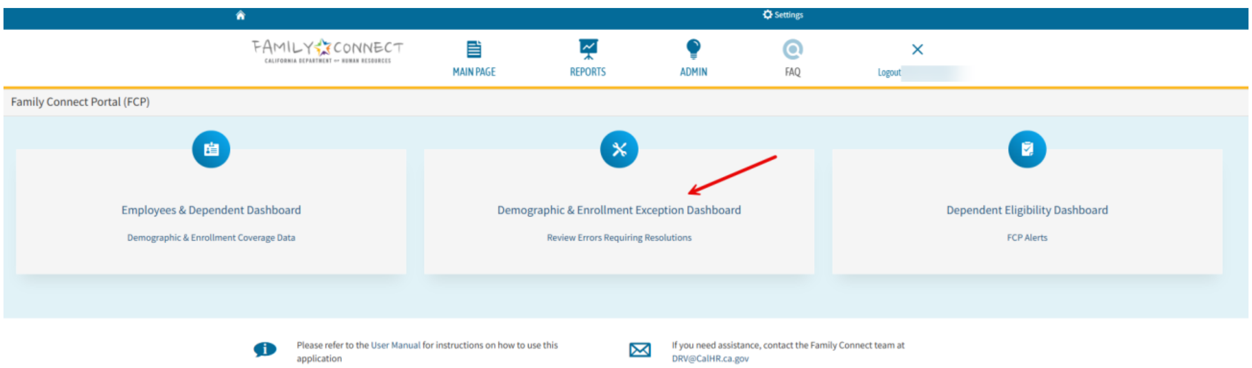
The re-verification of dependents enrolled in dental and/or premier vision is processed in the **Dependent Eligibility Dashboard.**

Scenario: Process a dependent re-verification in the Dependent Eligibility Dashboard. Note: Verify the dependent only after you have received all required DRV documents.

Step Actions

Step 1:

On the FCP Main Page, select the **Dependent Eligibility Dashboard** tab. The **Dependent Eligibility Dashboard** page displays.

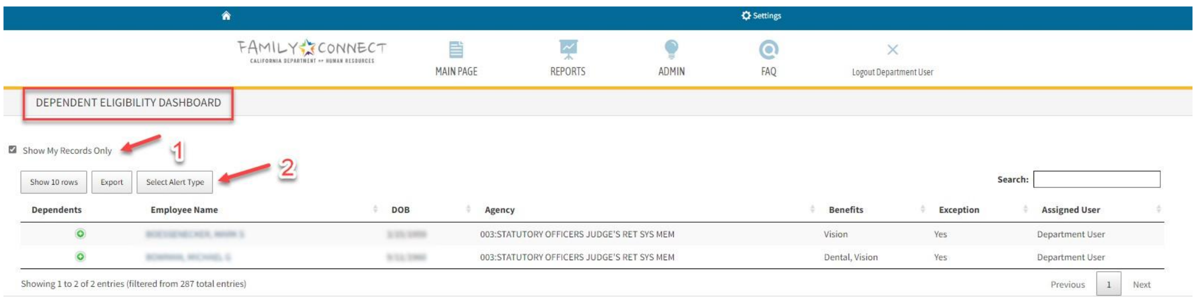


Step 2:

On the **Dependent Eligibility Dashboard** page, the "Show My Records Only" (#1) is defaulted to yes with a checkmark. You can uncheck this box to see all employee accounts (assigned to you, unassigned or assigned to another HR personnel within your department).

In this Dashboard, by default, you will see a combined list of all employees with dependents who require re-verification as well as all employees with dependents who are nearing age 26.

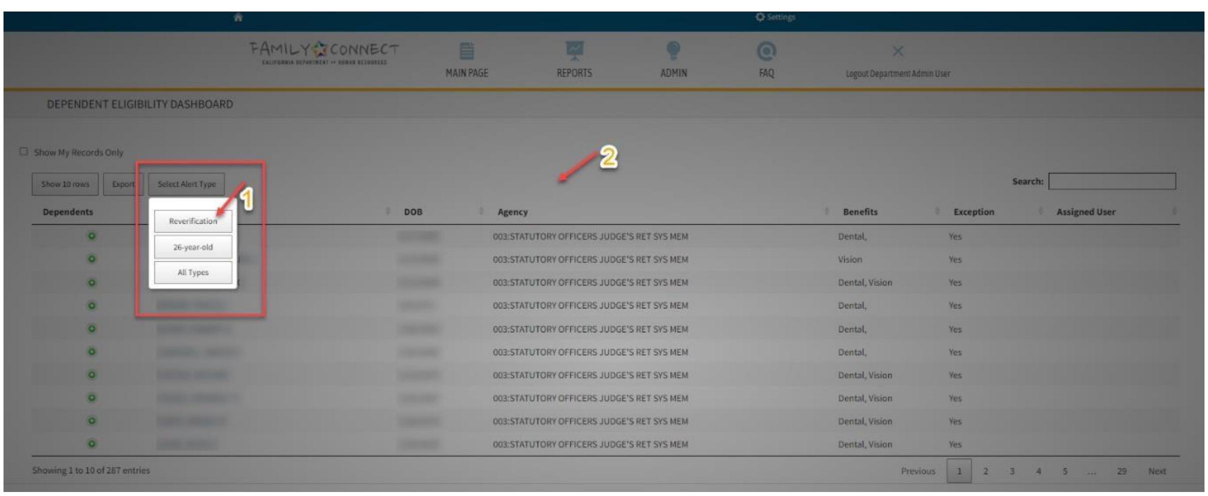
You have the option to filter by alert type by clicking on the **Select Alert Type** button (#2). This will give you three options: Reverification, 26- year-old, and All types.



Step 3:

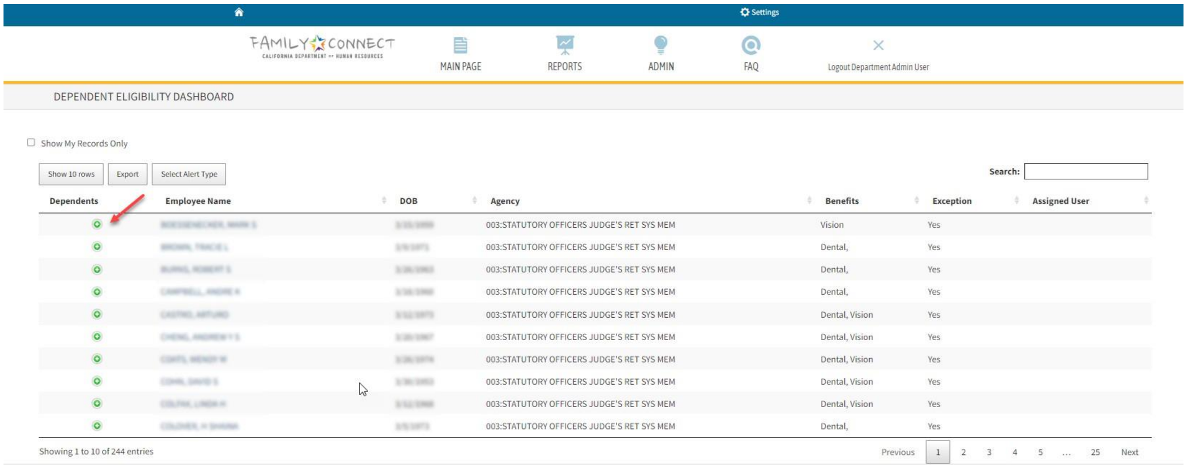
From the Select Alert Type menu, click on the **Reverification** button (#1). Within a few seconds, the Dependent Eligibility Dashboard is filtered and only shows dependent(s) scheduled for the current re-verification cycle based on the DRV schedule.

Next, click anywhere (#2) on the Dashboard screen to exit out of the **Select Alert Type** menu.



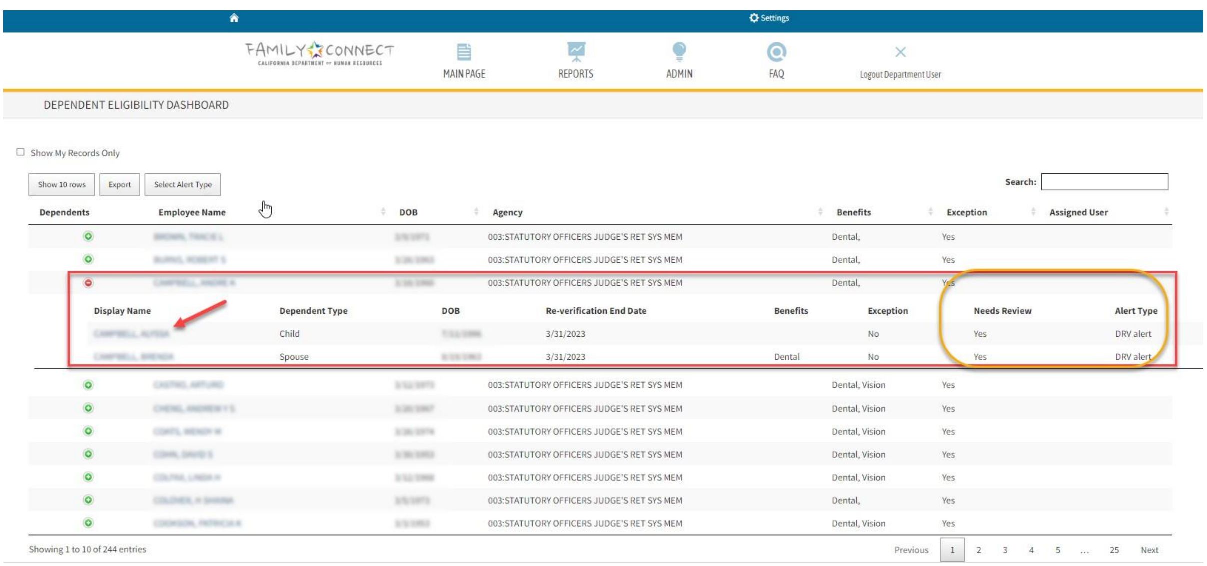
Step 4:

For a quick view of an employee's dependent(s), click on the **green plus button** in the Dependents column. The **Dependents** list panel will display.



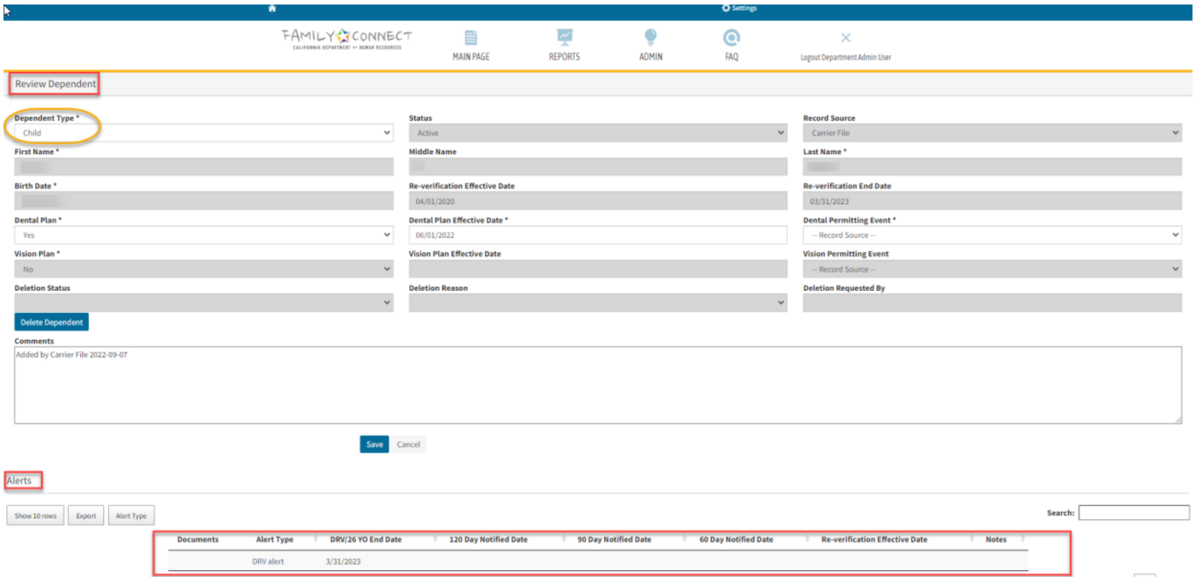
Step 5:

The Dependent panel will display all dependents. The **Needs Review** and **Alert Type** will indicate which dependents need to be re-verified. Next, click on the name of the dependent child who needs to be re-verified. The **Review Dependent** page is displayed.



Step 6:

In the **Review Dependent** page, from the **Alerts** panel click on the **DRV alert** link. The **Edit DRV alert "Month/Year"** page will be displayed.



Step 7:

The Edit DRV Alert page name is updated with each birth month cycle and lists the dependent's name.

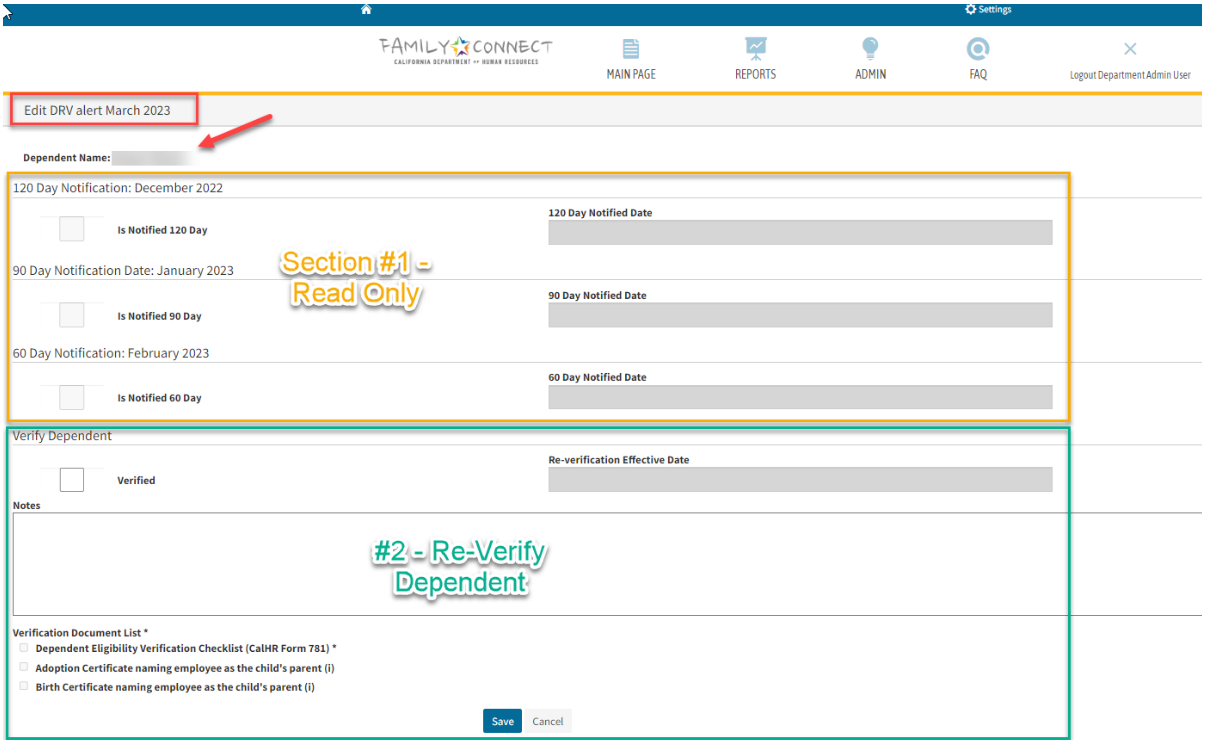
The Edit DRV Alert page is divided into two sections:

Section #1 - Is the DRV Notification section and is "read only". CalHR will update the notification date as each DRV notification is mailed out to the employee.

Note: The notified date in FCP is the date the notifications were generated. It is not the date they were mailed out. Notifications are mailed out the 1st business day of the month following the notified date.

Example: 90 Day Notified Date = 12/14/22 Mailing Date = 01/03/23

Section #2 - Is the Verify Dependent section. This is the section in which HR offices process the dependent's re-verification.



Step 8:

In the **Verify Dependent** Section, to verify the dependent, take the following steps:

1. **Check the Verified checkbox**. This will display the dependent's Re- verification Effective Date
2. Next, from the **Verification Document List**, select all required documents submitted by the employee
3. Finally, click on the **Save** button to save the dependent's re-verification

Note: Verify the dependent only after you have received all required DRV documents.

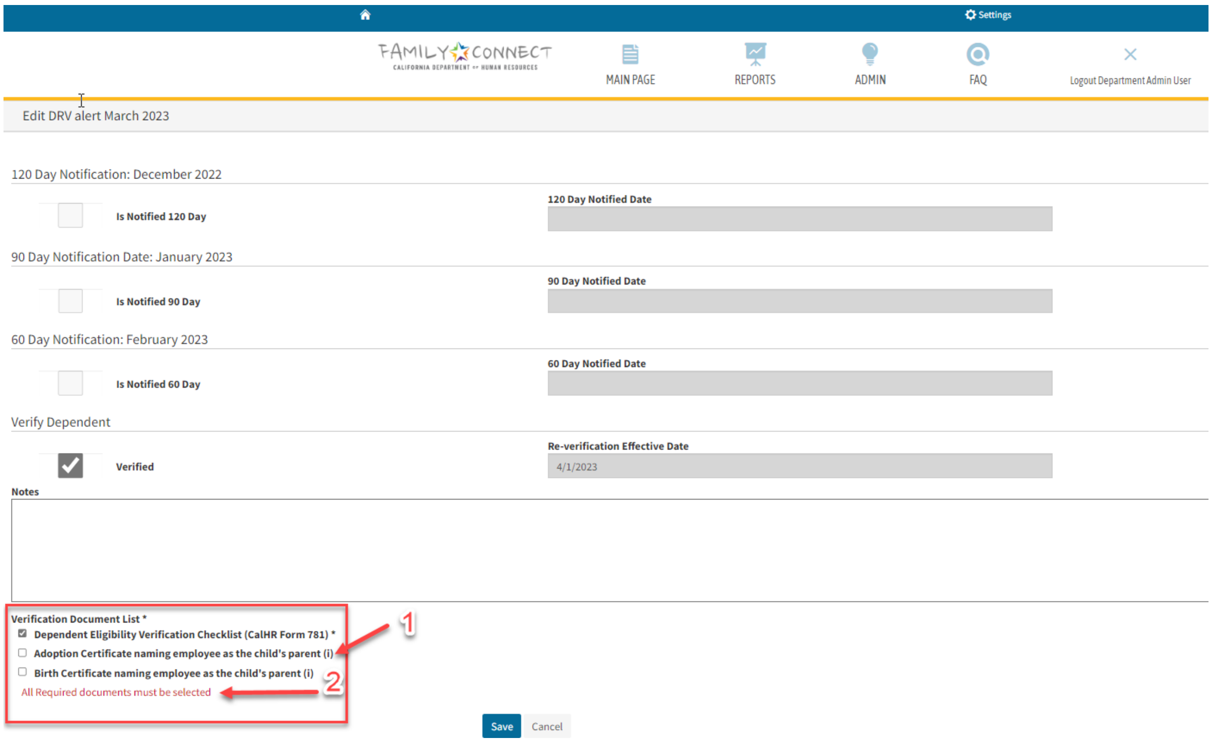
Step 9:

When re-verifying a dependent, **all** required documents for the dependent must be selected before the FCP will save the record.

1. Documents with an **i.** in parentheses are related to one document requirement. One or the other

must be selected. For example, for a Child, select Birth Certificate (for a natural born child) or Adoption Certificate (for adopted child).

2. If a required document is not selected and the save button is selected, the following red error message will display: "All Required documents must be selected"



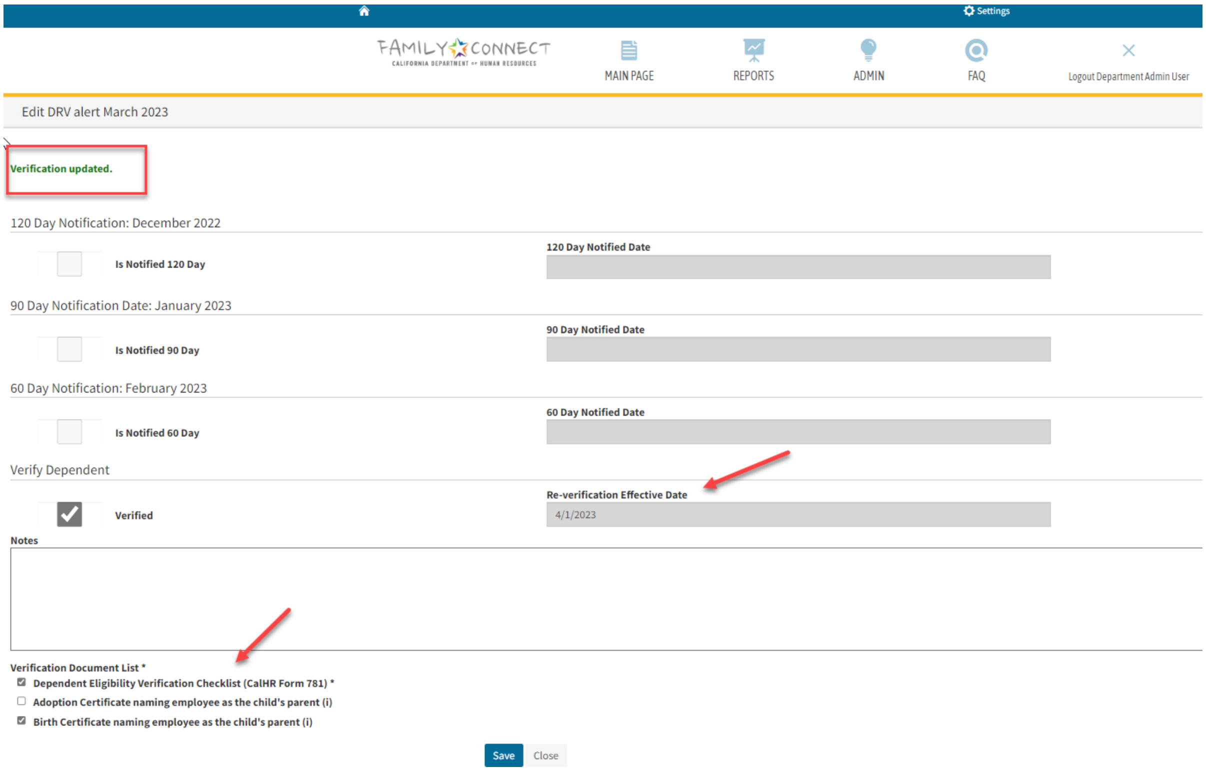
Step 10:

Once the re-verification is saved successfully, you will receive a confirmation message: **Verification updated**

In addition, the system will save the following information on the Edit DRV Alert page:

1. Re-verification Effective Date
2. Documents selected from the Verification Document List

You can exit the **Edit DRV alert** page by selecting close. This will return you to the **Review Dependent** page. From this page, you can select Cancel to return to the Dependent Eligibility Dashboard.



This completes the Dependent Re-Verification Process scenario.

6.0 26-Year-Old Dependent Age Out Process

Departmental Personnel Offices are responsible for notifying employees of dependent child(ren) nearing age 26, of their dependent(s) upcoming deletion event and providing disabled dependent and COBRA eligibility information and forms.

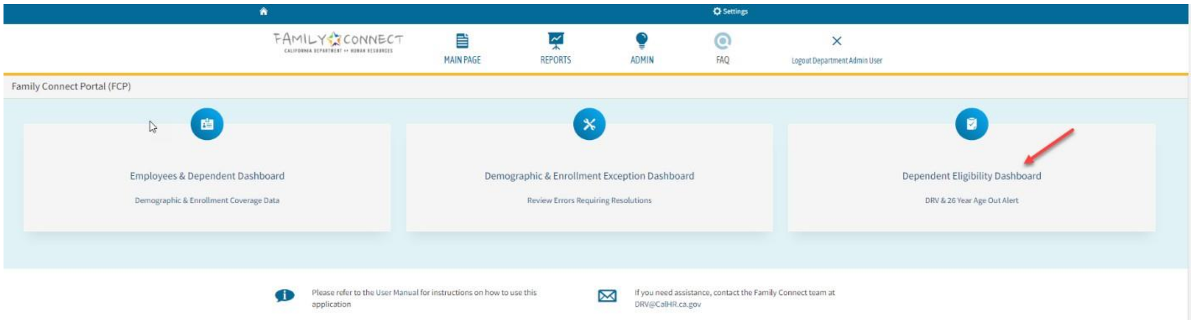
The **Dependent Eligibility Dashboard** contains accounts of all employees with dependent child(ren) who are within 0-4 months of nearing age 26. Departmental Personnel Offices are required to update each dependent account after notifications are sent to the employee.

Scenario: In the **Dependent Eligibility Dashboard**, update a dependent's account (nearing age 26) with the notification sent date.

Step Actions

Step 1:

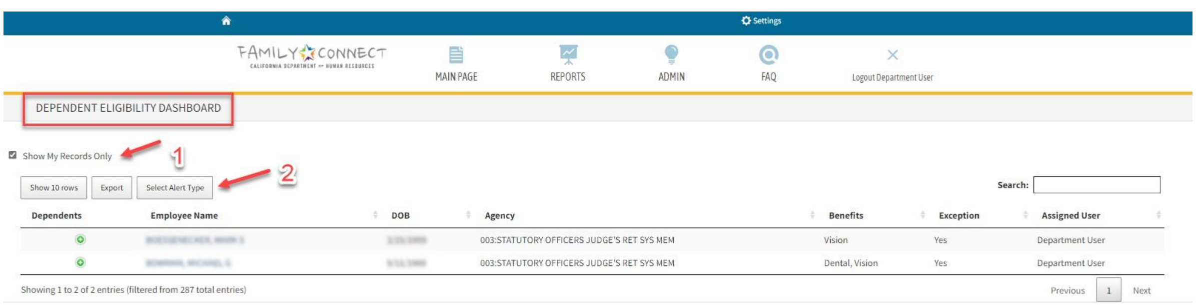
On the FCP Main Page, select the **Dependent Eligibility Dashboard** tab. The **Dependent Eligibility Dashboard** page displays.



Step 2:

On the **Dependent Eligibility Dashboard** page, the "Show My Records Only" (#1) is defaulted to yes with a checkmark. You can uncheck this box to see all employee accounts (assigned to you, unassigned or assigned to another HR personnel within your department).

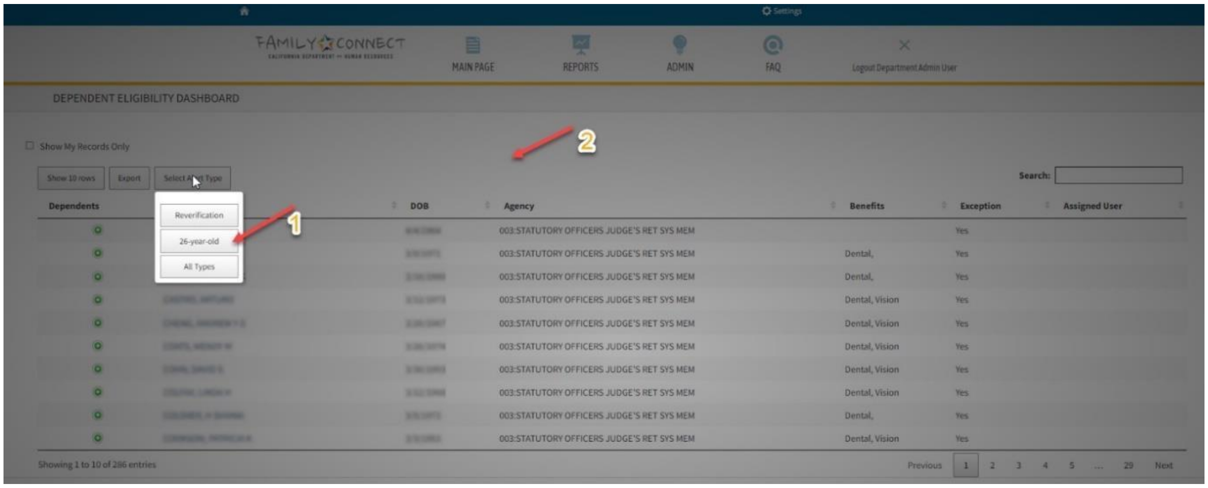
In this Dashboard, by default, you will see a combined list of all employees with dependents who require re-verification as well as all employees with dependents who are nearing age 26. You have the option to filter by alert type by clicking on the **Select Alert Type** button (#2). This will give you three options: Reverification, 26- year-old, and All types.



Step 3:

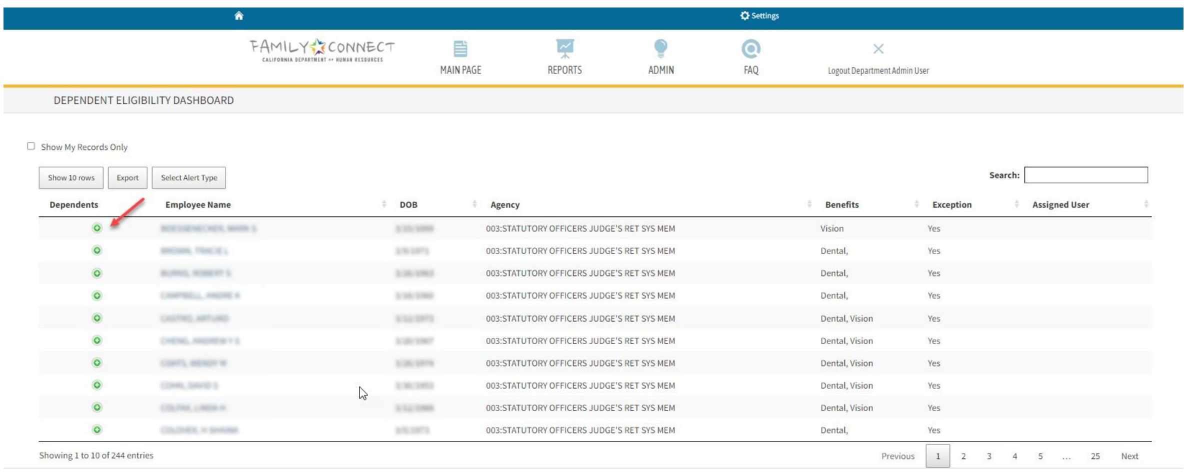
From the Select Alert Type menu, click on the **26-year-old** button (#1). Within a few seconds, the Dependent Eligibility Dashboard is filtered and only shows dependent(s) who are within 0-4 months of turning age 26.

Next, click anywhere (#2) on the Dashboard screen to exit out of the **Select Alert Type** menu.



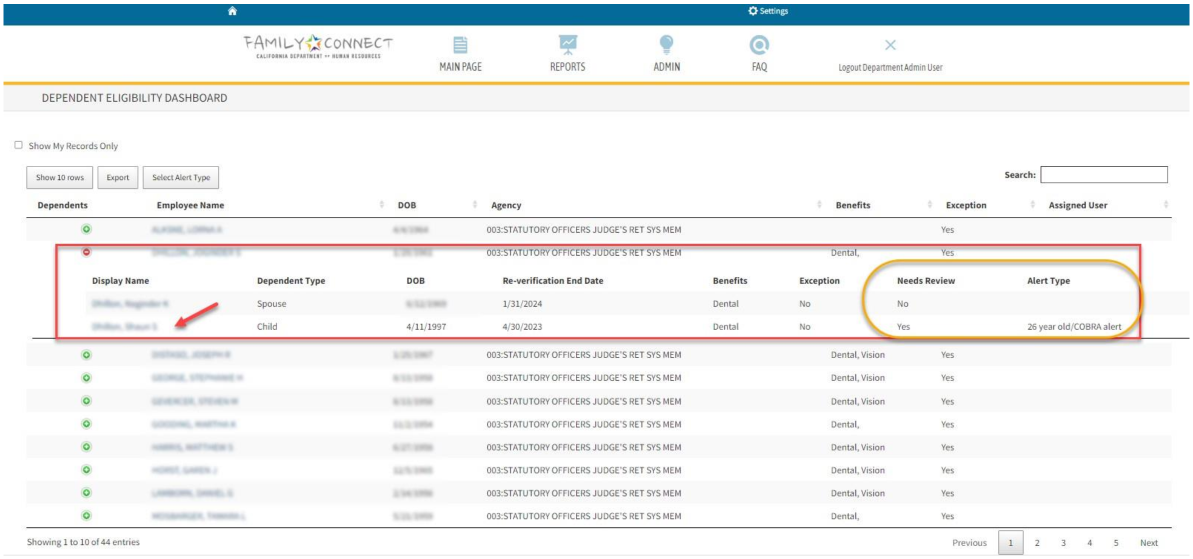
Step 4:

For a quick view of an employee's dependent(s), click on the **green plus button** in the Dependents column. The **Dependents** list panel will display.



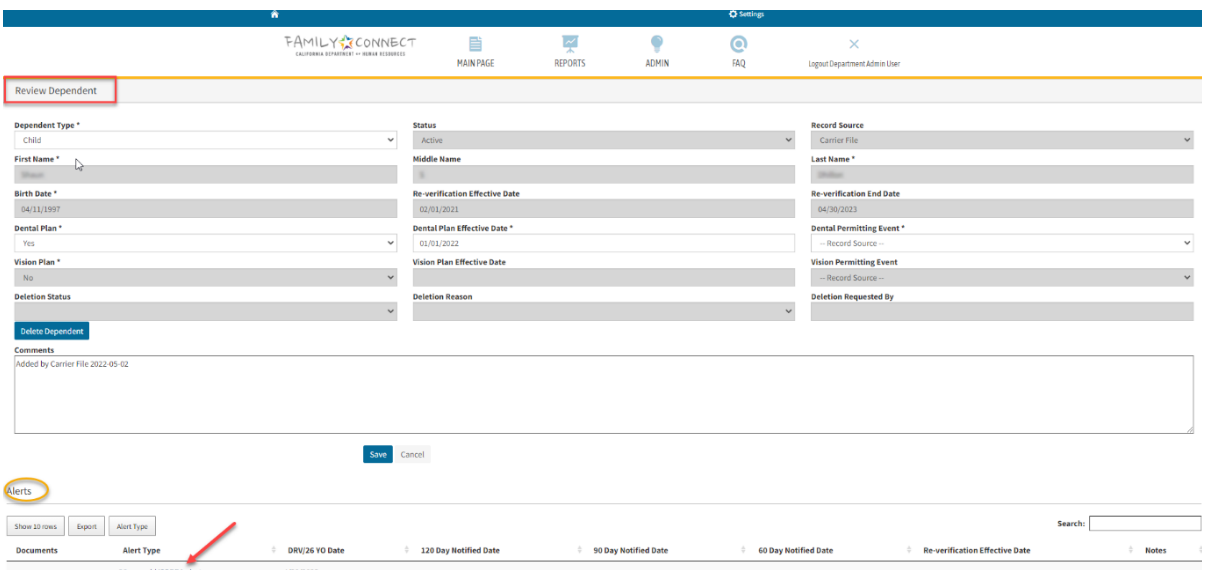
Step 5:

The Dependent panel will display all dependents. The **Needs Review** and **Alert Type** will indicate which dependent is turning age 26. Click on the name of the dependent child. The **Review Dependent** page is displayed.



Step 6:

In the **Review Dependent** page, on the **Alerts** panel, click on the **26-year- old/COBRA alert** link. The **Edit 26-year-old/COBRA alert** page will be displayed.



Step 7:

The **Edit 26 year old/COBRA alert** page displays the dependent's name, birth date and the date they will be turning age 26.

To ensure notification compliance, Departmental Personnel Offices will update this page each month when notification is sent to the employee. Updates for each notification can only be made during the month indicated for each notification type. All other times, the information is “read only”.

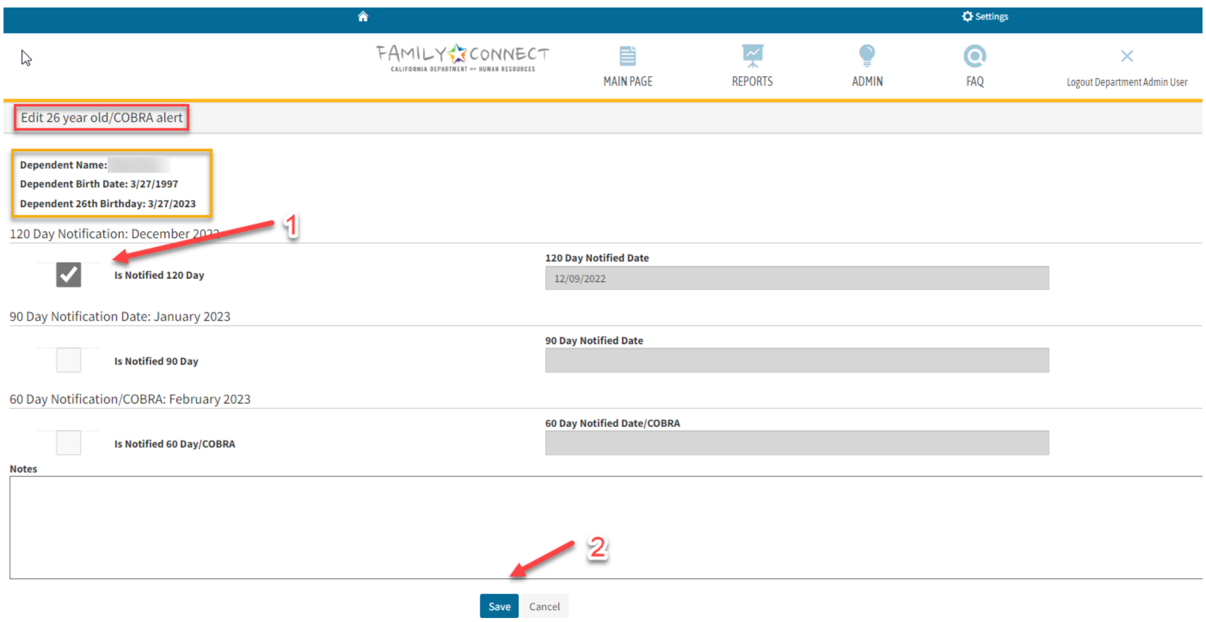
For example, the first notification should go out at 120 days which for this dependent is in January 2023. The 120-day notification checkbox will be "live" in January 2023 allowing the user to check the box and save the notified date.

To enter and save the notification information, follow these steps:

1. Click on the checkbox for the current notification month
2. Then click on the Save button.

Once the entry is saved successfully, you will receive a confirmation message:
Notification updated

You can exit the **Edit 26 year old/COBRA alert** page by selecting close. This will return you to the **Review Dependent** page. From this page, you can select Cancel to return to the **Dependent Eligibility Dashboard**.



This completes the 26-year-old Dependent Age Out Process scenario.

7.0 Reports Tab

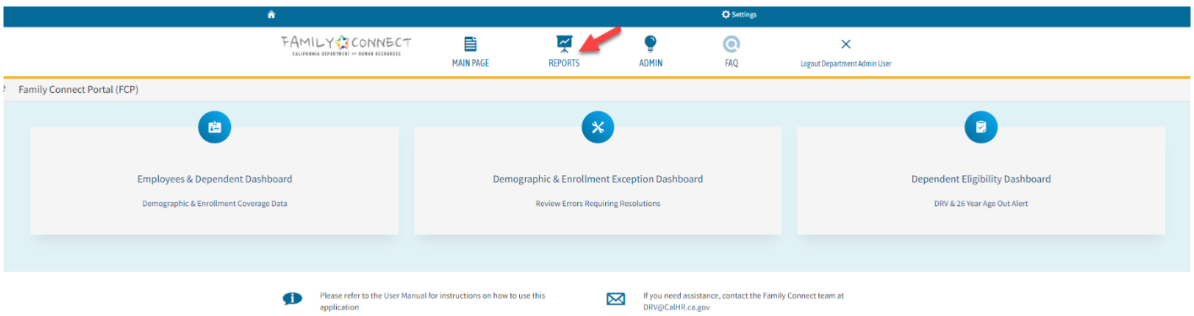
The Reports Tab in FCP provides several Reports for Departmental Personnel Offices use. All these reports can be exported into CSV and Excel.

Scenario: Review reports in the **REPORTS** tab.

Step Actions

Step 1:

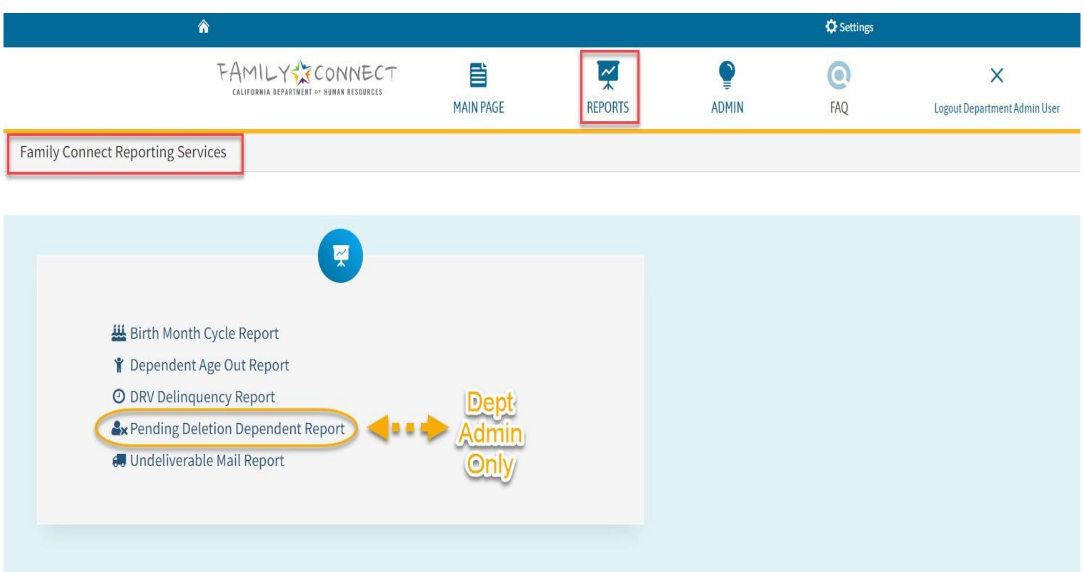
On the FCP Main Page, select the **REPORTS** tab. The **Family Connect Reporting Services** page will display.



Step 2:

On the **Family Connect Reporting Services** page, the following reports are available:

1. Birth Month Cycle Report
2. Dependent Age Out Report
3. DRV Delinquency Report
4. Pending Deletion Dependent Report - Only available to Dept Admin Users
5. Undeliverable Mail Report



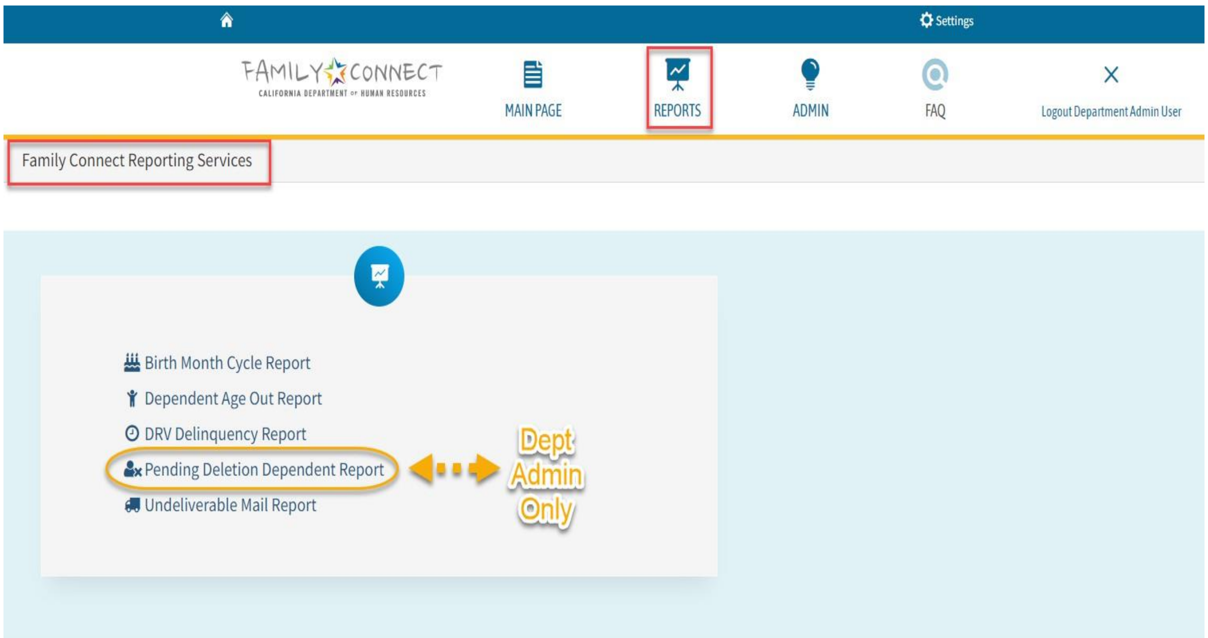
Birth Month Cycle Report

Review the Birth Month Cycle Report.

Step Actions

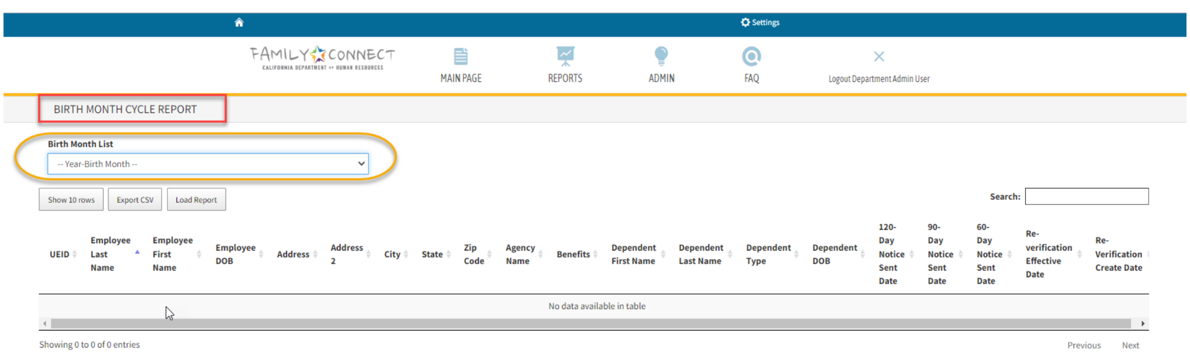
Step 1:

Click on the Reports Tab, and from the **Family Connect Reporting Services** page, select the Birth Month Cycle Report.



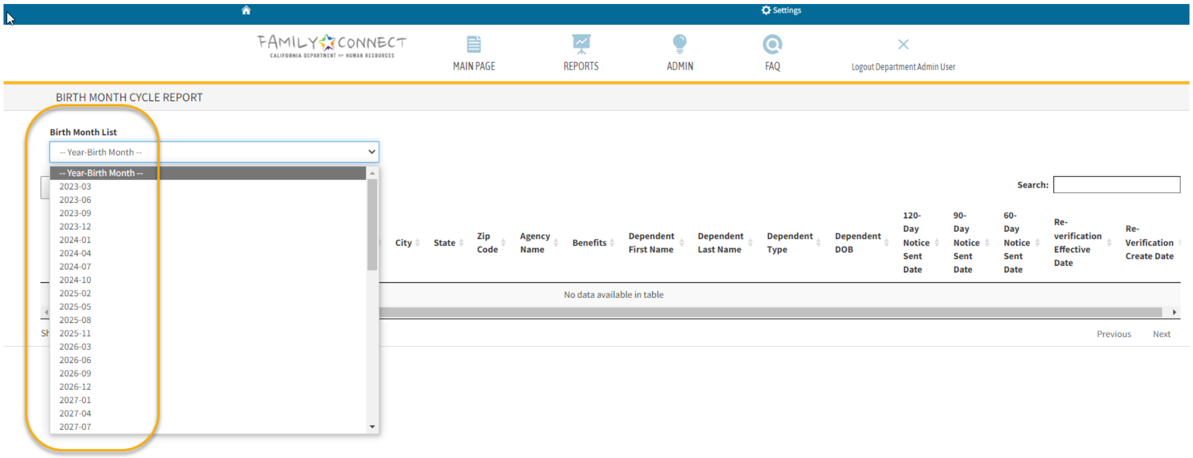
Step 2:

On the Birth Month Cycle Report page, select from the **Birth Month List** to see the full report by each cycle.



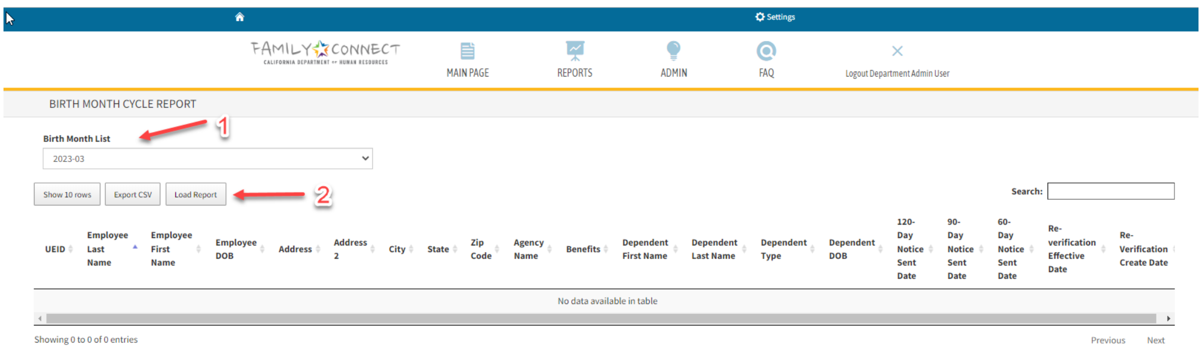
Step 3:

Select the DRV report by cycle year and birth month:



Step 4:

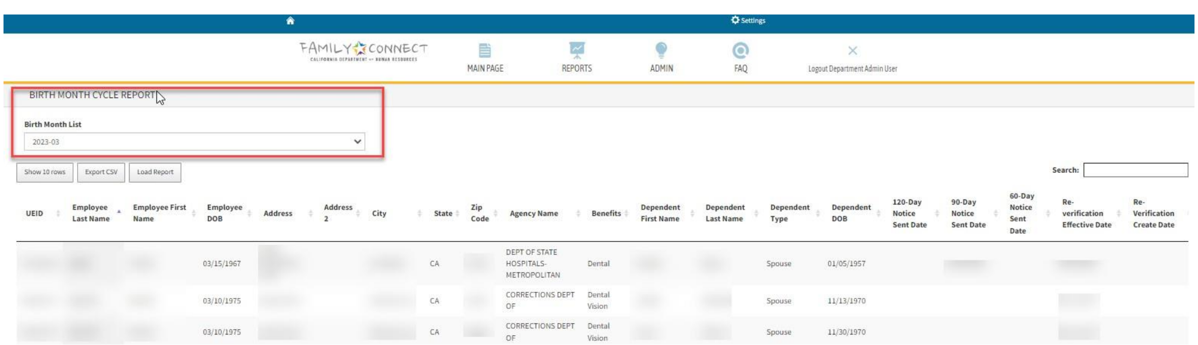
Once you have made your selection, ex. **2023-03** (March 2023), click on the **Load Report** button to display the report.



Step 5:

The March 2023 Birth Month Cycle Report information is displayed. Because this is a large report, it can only be exported in the CSV format. However, once the report is exported and opens in CSV, you have option to save it as Excel.

The notification dates and re-verification date will get updated on this report as notifications are sent and re-verifications are processed in FCP.



This completes the Birth Month Cycle Report overview scenario.

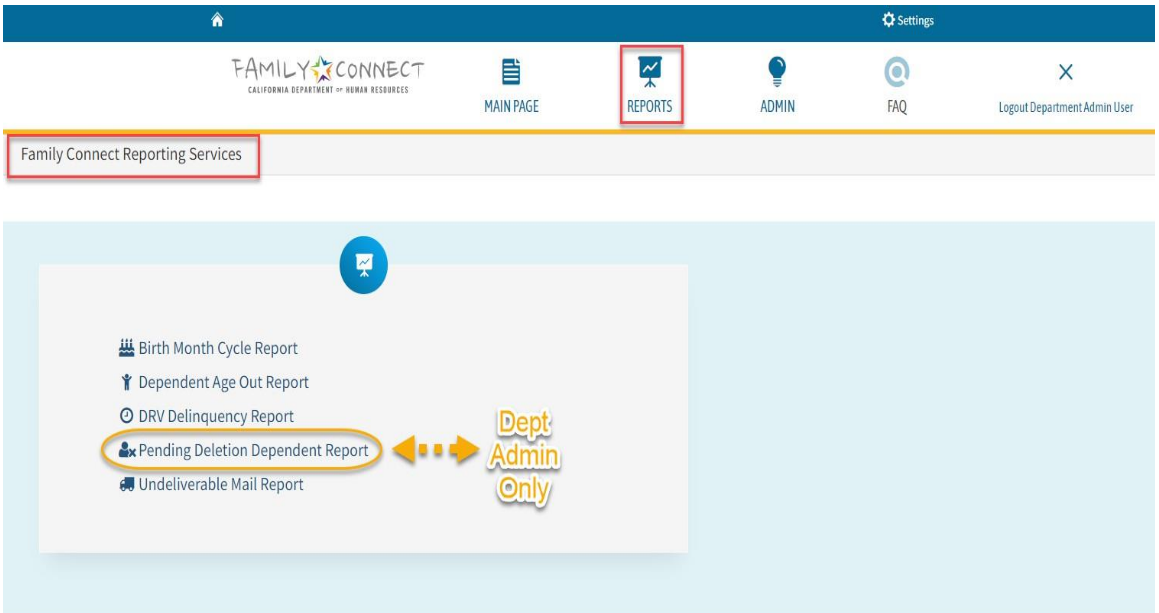
Dependent Age Out Report

Review the Dependent Age Out Report.

Step Actions

Step 1:

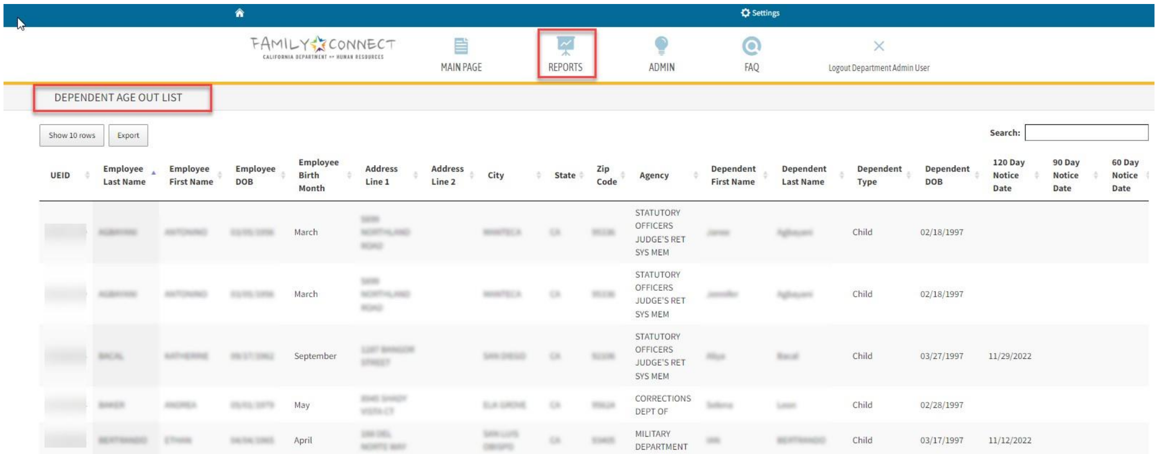
Click on the Reports Tab, and from the **Family Connect Reporting Services** page, select the Dependent Age Out Report.



Step 2:

On the Dependent Age Out Report page, by default, the information of all dependent children within 0-4 months will display. This report can be exported into Excel.

Dependents will remain on this report until the vendor removes them from benefits. All deletion requests must be submitted to the vendor and/or SCO. **Dependent children must be removed from dental and premier vision benefits effective the 1st of the month following their 26th year/birth month.**



This completes the Dependent Age Out Report overview scenario.

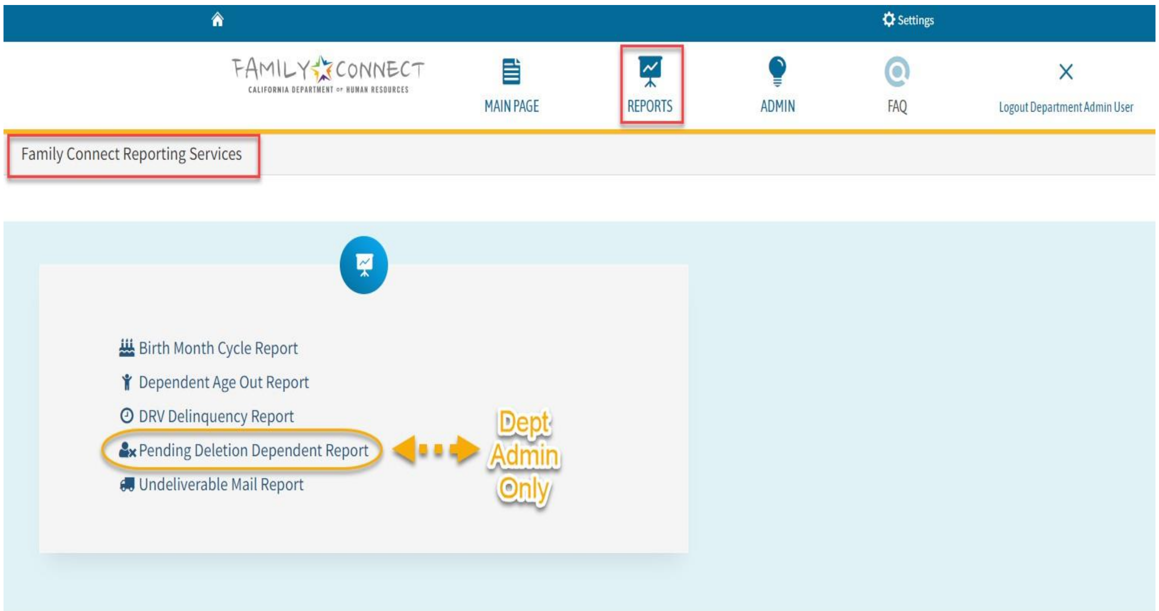
DRV Delinquency Report

Review the DRV Delinquency Report.

Step Actions

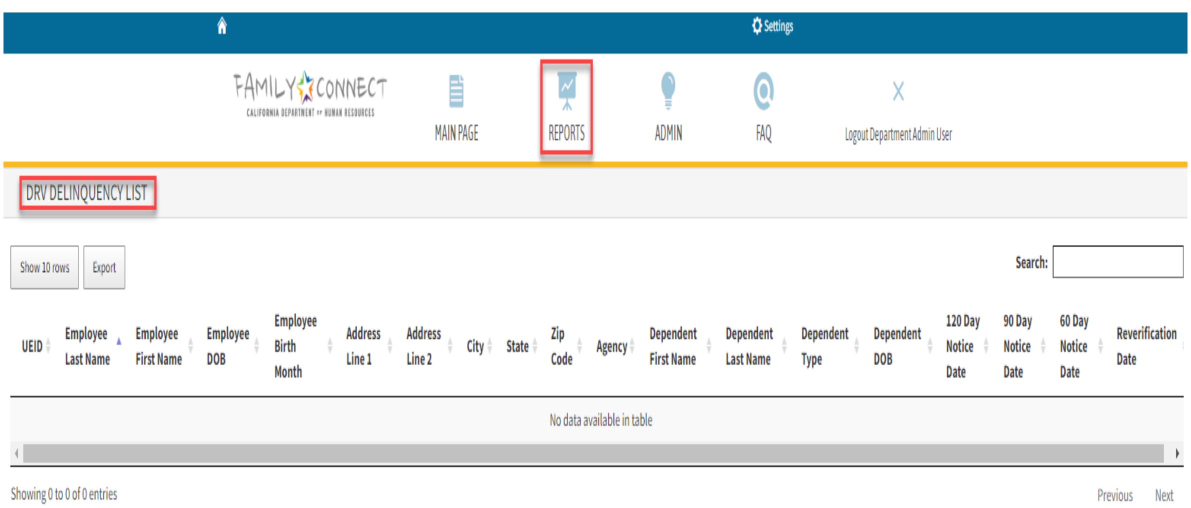
Step 1:

Click on the Reports Tab, and from the **Family Connect Reporting Services** page, select the DRV Delinquency Report.



Step 2:

The DRV Delinquency Report page will display dependents who remain unverified past the employee's DRV cycle. This report contains unverified dependents from all birth month cycles. **Departmental personnel office must remove these dependents from dental and/or premier vision benefits effective 1st of the month following the employee's birth month according to the DRV schedule.**



This completes the DRV Delinquency Report overview scenario.

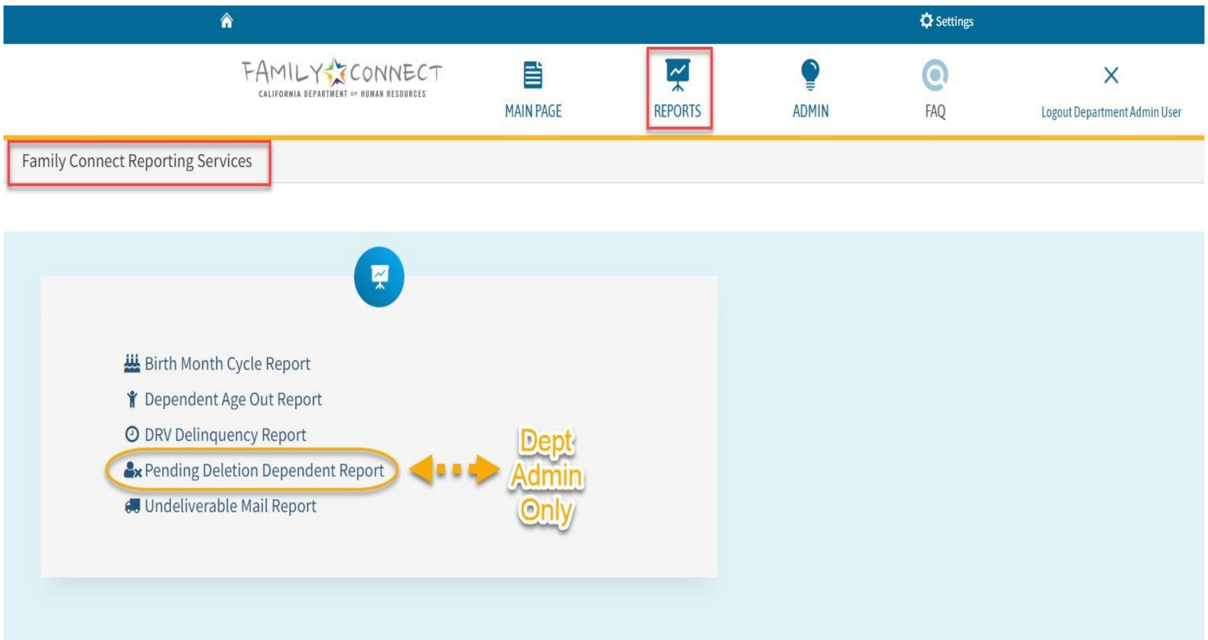
Pending Deletion Dependent Report (Dept Admin User only)

Review the Pending Deletion Dependent Report.

Step Actions

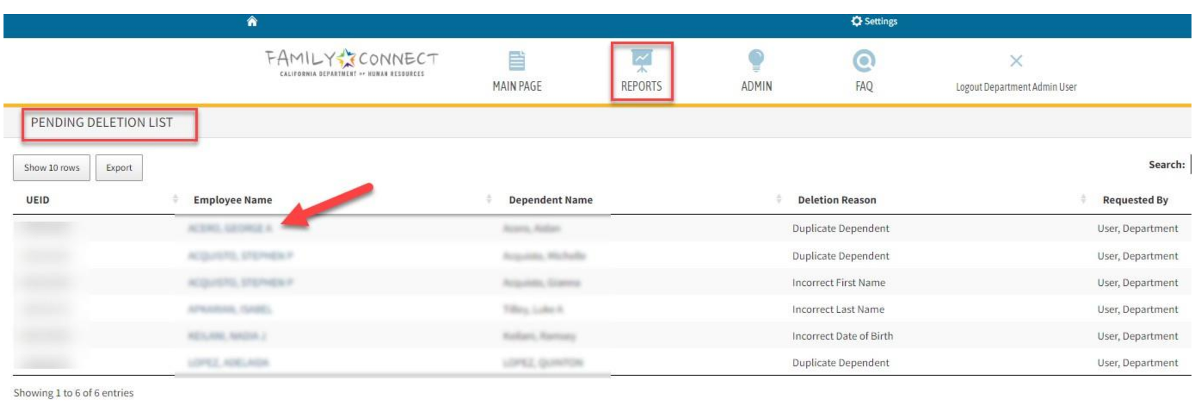
Step 1:

Click on the Reports Tab, and from the **Family Connect Reporting Services** page, select the Pending Deletion Dependent Report.



Step 2:

On the Pending Deletion List page, Dept Admin users can review all dependent deletion requests submitted by Department Users. To delete the dependent, click on the employee's name. The **Review Employee** page will display.

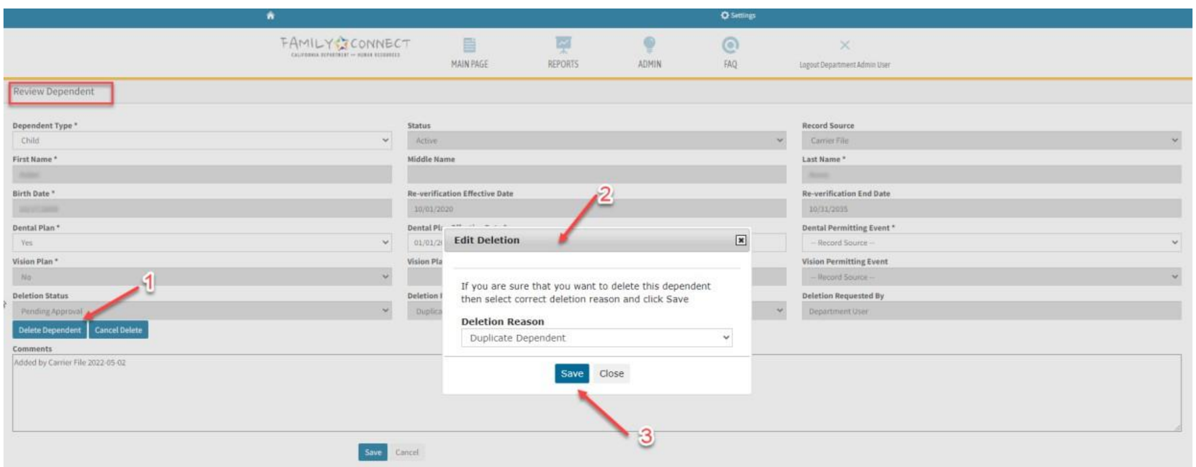


Step 3:

On the Review Employee page go to the Dependent Panel and select the Dependent Name that is pending deletion.

Step 4:

On the Review Dependent page select the Delete Dependent button and select Save on the pop-up button to delete the dependent. Once deleted, you will be returned to the Review Employee page.



This completes the Pending Dependent Deletion Report overview scenario.

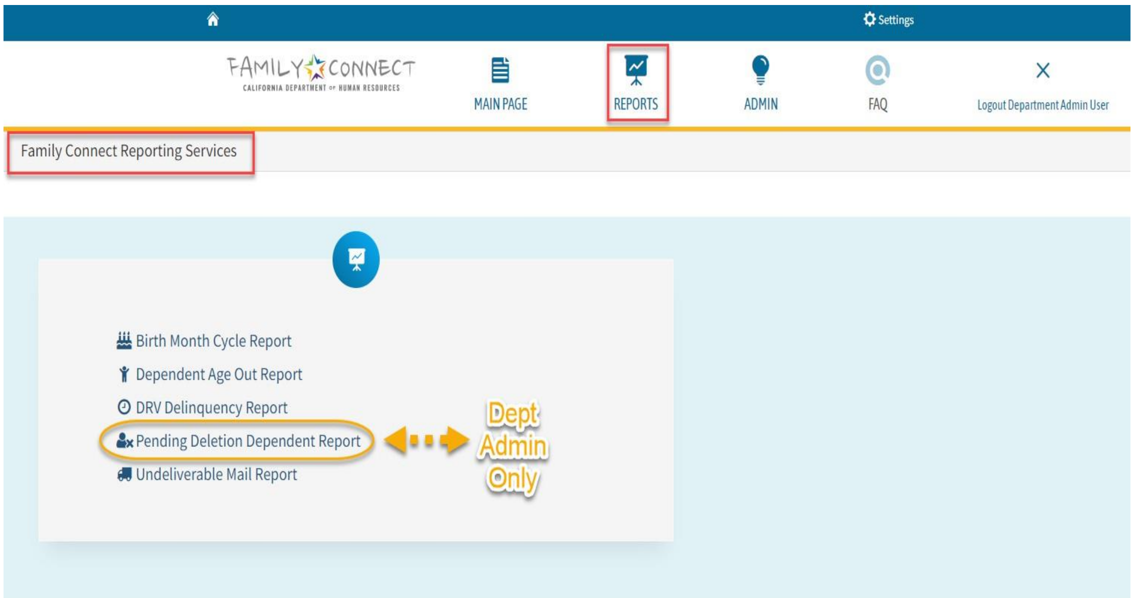
Undeliverable Mail Report

Review the Undeliverable Mail Report.

Step Actions

Step 1:

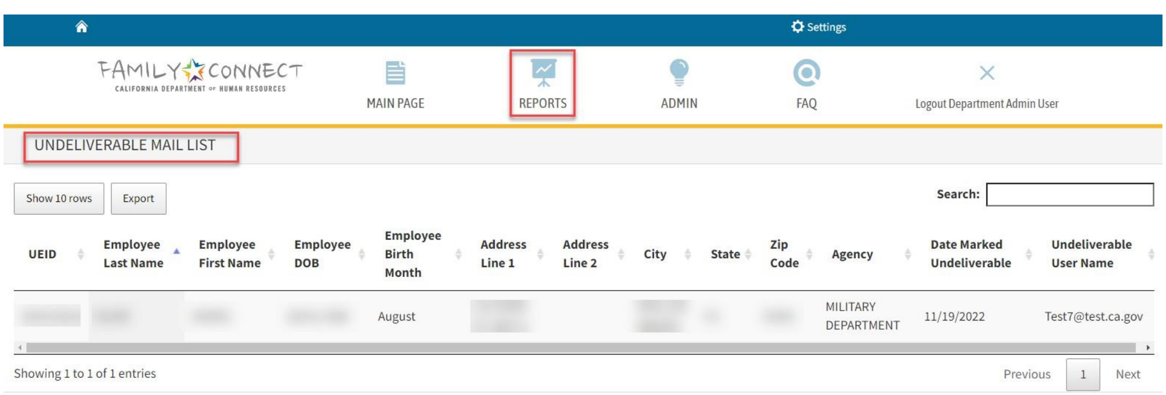
Click on the Reports Tab, and from the **Family Connect Reporting Services** page, select the Undeliverable Mail Report.



Step 2:

On the Undeliverable Mail Report page, the system will display a list of all employee accounts in FCP with an undeliverable address. An employee's address will be marked as Undeliverable by the DRV Unit when during their DRV cycle, the USPS system is unable to confirm the employee's mailing address provided by SCO and saved in FCP.

It is each department's responsibility to ensure that their employee's address is current and to take necessary actions to update outdated information as soon as possible.



This completes the Birth Month Cycle Report overview scenario.

8.0 DRV Unit Contact

Departmental Personnel Offices can send DRV, FCP and 26-year-old age out process related inquiries via email to DRV@calhr.ca.gov.