



State HR Professionals Manual



Benefits Division

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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
DRV

Log In

☐ I agree with terms and conditions

Email

Enter email

Password

Log In

[Forgot Password](#) [Request an Account](#)

[Back to Top](#) [Conditions of Use](#) [Privacy Policy](#) [Accessibility](#) [Contact Us](#) **CAL HR**

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.

Create Account / Log In

New Pending User Request

All Fields marked with an asterisk (*) are required

First Name *

Middle Name

Last Name *

State Email Address (Username) *

Phone # *

Classification *

-- Select a Classification --

Job Title *

User Role *

-- Select a Role --

Departments *

Select one or more items

Notes

Submit

Cancel

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**

Create Account / Log In

New Pending User Request

Your request for a new account has been submitted and is pending approval by the Administrator.

All Fields marked with an asterisk (*) are required

First Name *

Middle Name

Last Name *

State Email Address (Username) *

Phone # *

Classification *

PERSONNEL SUPERVISOR I

Job Title *

HR Supervisor

User Role *

Department Admin

Departments *

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Notes

Submit

Close

This completes your user account request submission process.

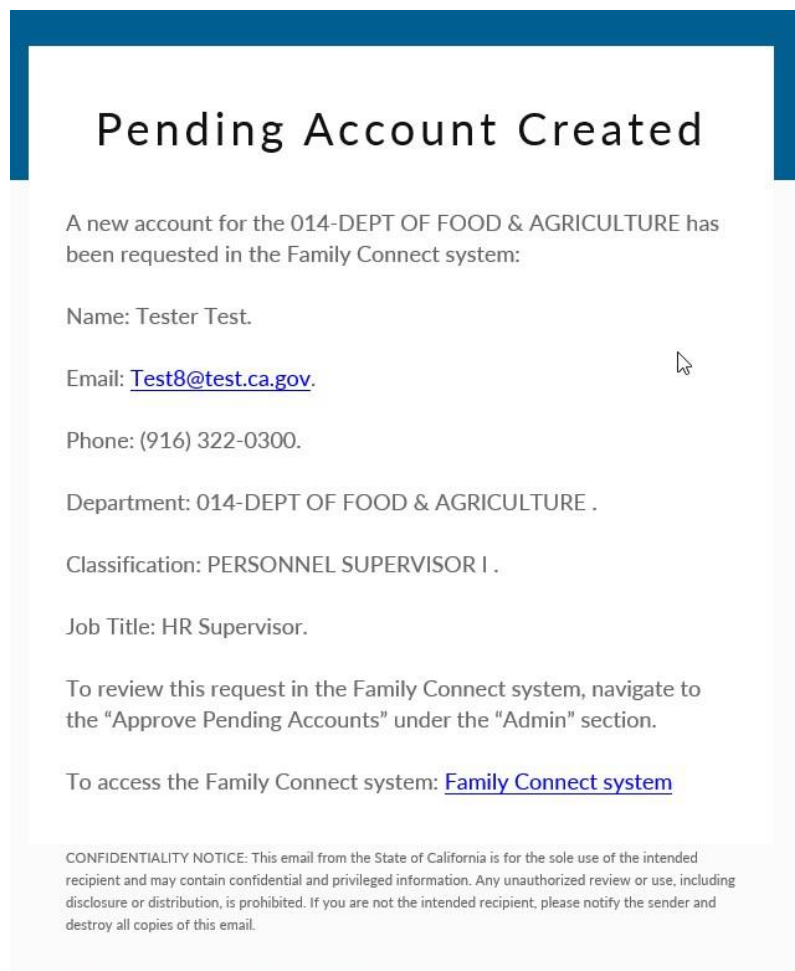
Dept Admin and VDHA Admin Account Review & Approval Process

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.



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.

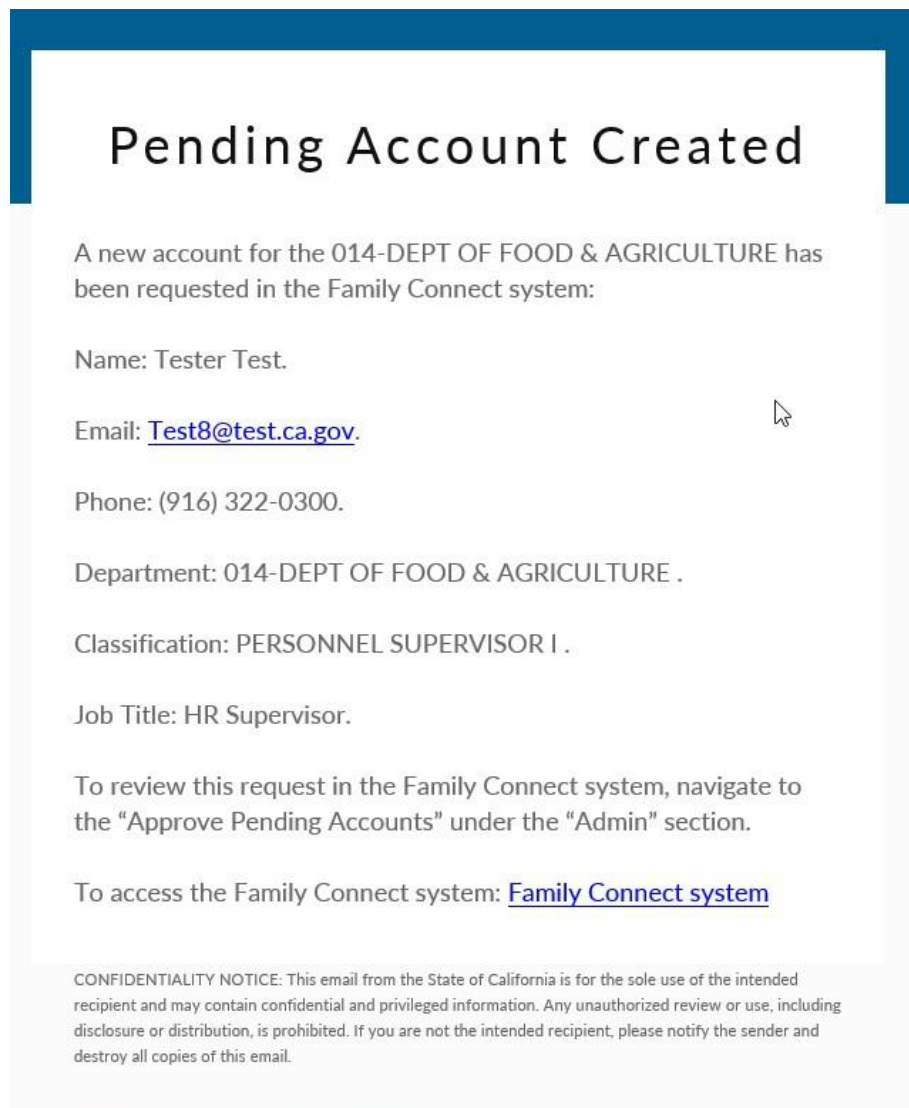
In the absence of an active Dept Admin and VDHA Admin user, the DRV Unit will substitute as the Dept Admin user and will provide guidance and assistance to allow continuation of required processes.

Step Actions

Step 1:

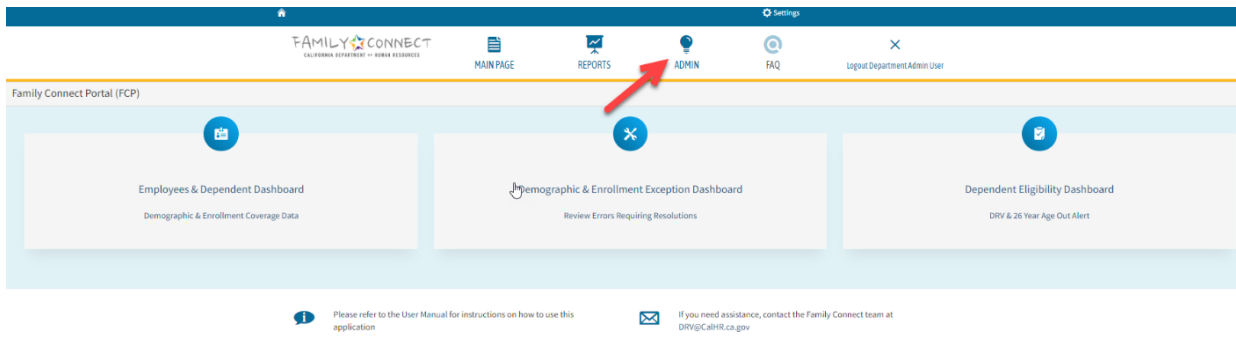
A Dept User's and/or VDHA account request and information is sent to their respective Dept Admin and/or VDHA Admin user.

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



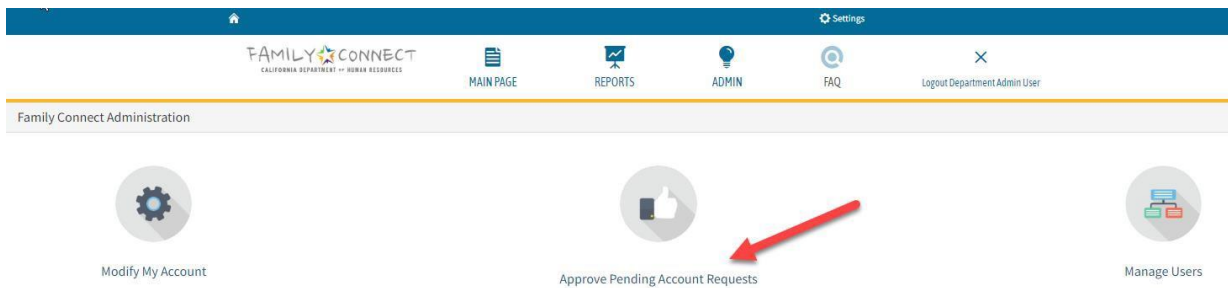
Step 2:

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



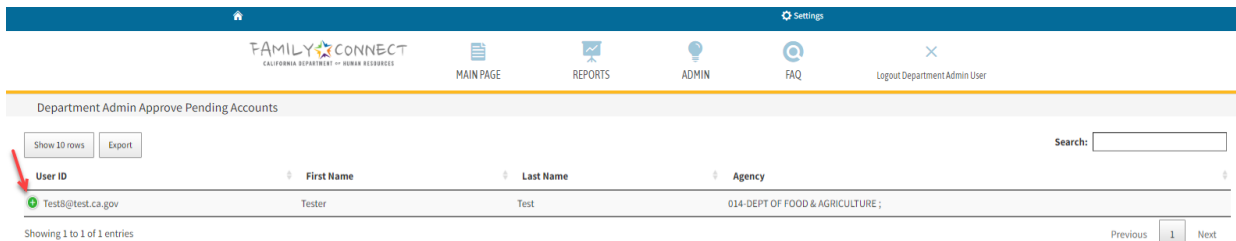
Step 3:

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.



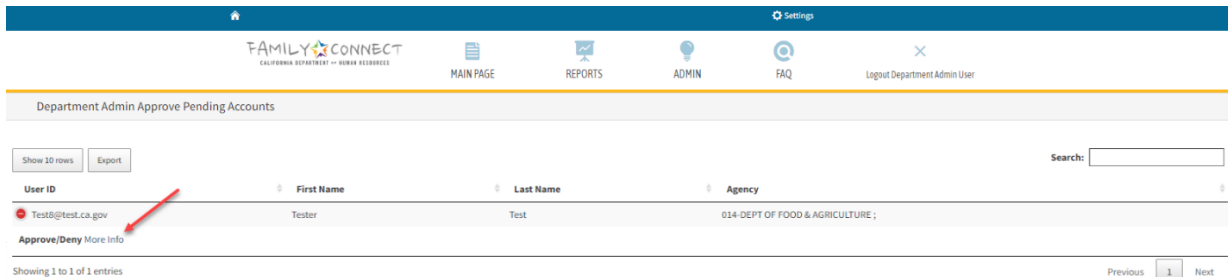
Step 4:

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.





MAIN PAGEREPORTSADMINFAQLogout Department Admin User

Review Pending Request for Test, Tester

First Name *

Middle Name

Last Name *

TesterTest

State Email Address (Username) *

Test9@test.ca.gov

Phone # *

(916) 322-0300

Classification

PERSONNEL SPECIALIST

Job Title *

Personnel Specialist

User Role *

Department User

Departments *

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Requestor Notes

☐ Can Access Child Departments

Email Message

ApproveDenyCancel

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.



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

The screenshot shows the Family Connect login interface. At the top is a blue header with a home icon and a 'Settings' link. Below the header is the 'FAMILY CONNECT' logo with 'CALIFORNIA DEPARTMENT OF HUMAN RESOURCES' underneath. On the right, there is a 'Create Account / Log In' link. The main login form has a 'Log In' button with a lock icon. Below it is a checkbox labeled 'I agree with terms and conditions'. There are two input fields: 'Email' (containing 'First.Employee@calhr.ca.gov') and 'Password' (containing masked characters). At the bottom of the form are links for 'Forgot Password' and 'Request an Account'. A yellow callout bubble with the text 'FCP Security Agreement' points to the checkbox. Four red arrows with numbers 1 through 4 indicate the steps: 1 points to the 'Log In' button, 2 points to the 'Email' field, 3 points to the 'Password' field, and 4 points to the 'Log In' button.

Step 3:

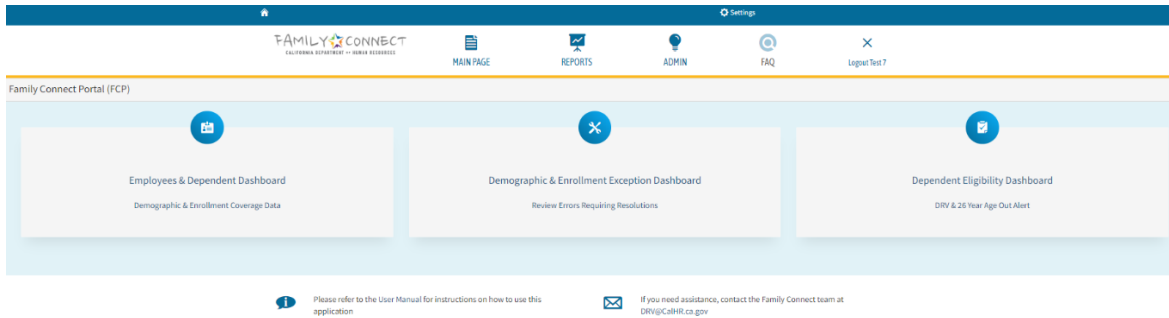
The **Change Password** screen is displayed. This is the same screen that displays if you forgot your password and an Admin User sends you a password reset

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

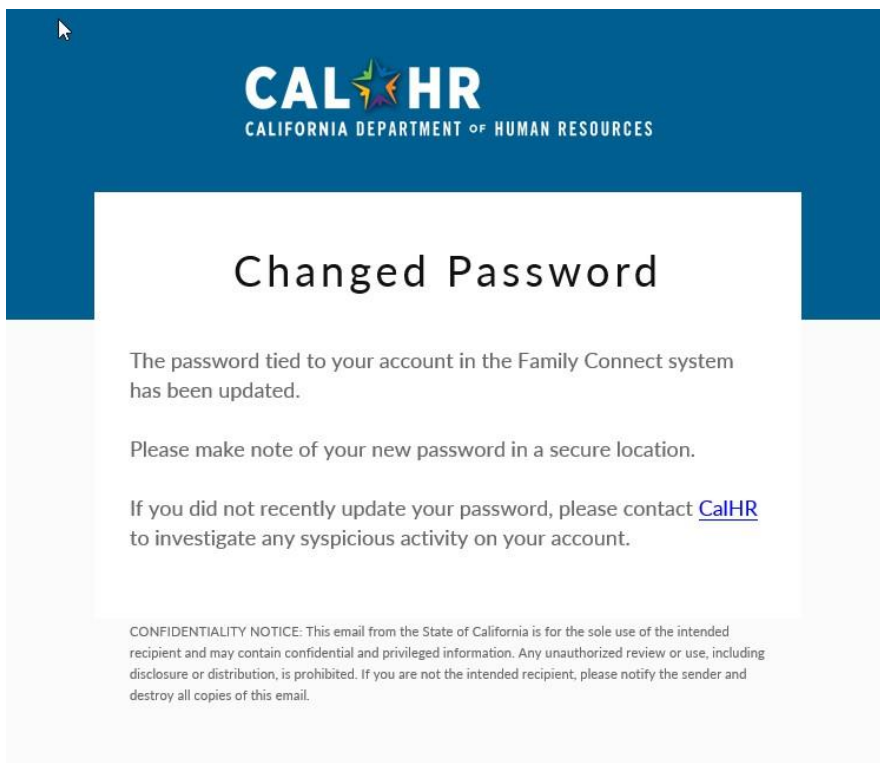
The screenshot shows the 'Change Password' screen. At the top is a blue header with a home icon and a 'Settings' link. Below the header is the 'FAMILY CONNECT' logo with 'CALIFORNIA DEPARTMENT OF HUMAN RESOURCES' underneath. There are navigation links: 'MAIN PAGE', 'REPORTS', 'ADMIN', 'FAQ', and 'Logout'. The main form has three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. At the bottom are 'Save Password' and 'Cancel' buttons. A red box on the right contains the 'New Password must:' requirements: 'be 8 or more characters long', 'have at least one lower case letter', 'have at least one upper case letter', and 'have at least one number'. Four red arrows with numbers 1 through 4 indicate the steps: 1 points to the 'Current Password' field, 2 points to the 'New Password' field, 3 points to the 'Confirm New Password' field, and 4 points to the '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**

The screenshot shows the Family Connect login page. At the top, there is a blue header with a home icon, a settings gear icon, and the text 'Settings'. Below the header is the 'FAMILY CONNECT' logo with 'CALIFORNIA DEPARTMENT OF HUMAN RESOURCES' underneath. To the right of the logo is a user icon and the text 'Create Account / Log In'. The main content area has a white background with a light gray border. It contains a 'Log In' section with a lock icon. Below this is a checkbox labeled 'I agree with terms and conditions'. There are two input fields: 'Email' with the placeholder 'Enter email' and 'Password'. At the bottom of the login section are three buttons: 'Log In', 'Forgot Password', and 'Request an Account'. Red numbers and arrows indicate the steps: '1' points to the checkbox, '2' points to the email field, and '3' points to the 'Forgot Password' button. At the bottom of the page is a dark gray footer with links: 'Back to Top', 'Conditions of Use', 'Privacy Policy', 'Accessibility', 'Contact Us', and the 'CAL HR' logo.

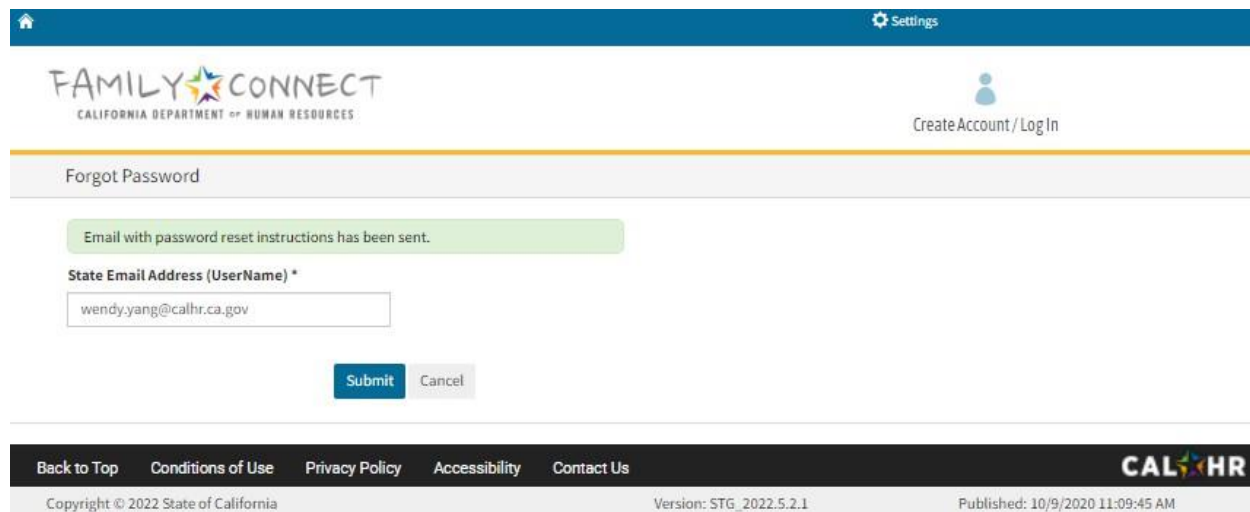
Step 3:

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

The screenshot shows the 'Forgot Password' page. At the top, there is a blue header with a home icon. Below the header is the 'FAMILY CONNECT' logo with 'CALIFORNIA DEPARTMENT OF HUMAN RESOURCES' underneath. The main content area has a white background with a light gray border. It contains a section titled 'Forgot Password'. Below this is a label 'State Email Address (UserName) *' and an input field. A red arrow points to the input field. At the bottom of the page are two buttons: 'Submit' and 'Cancel'.

Step 4:

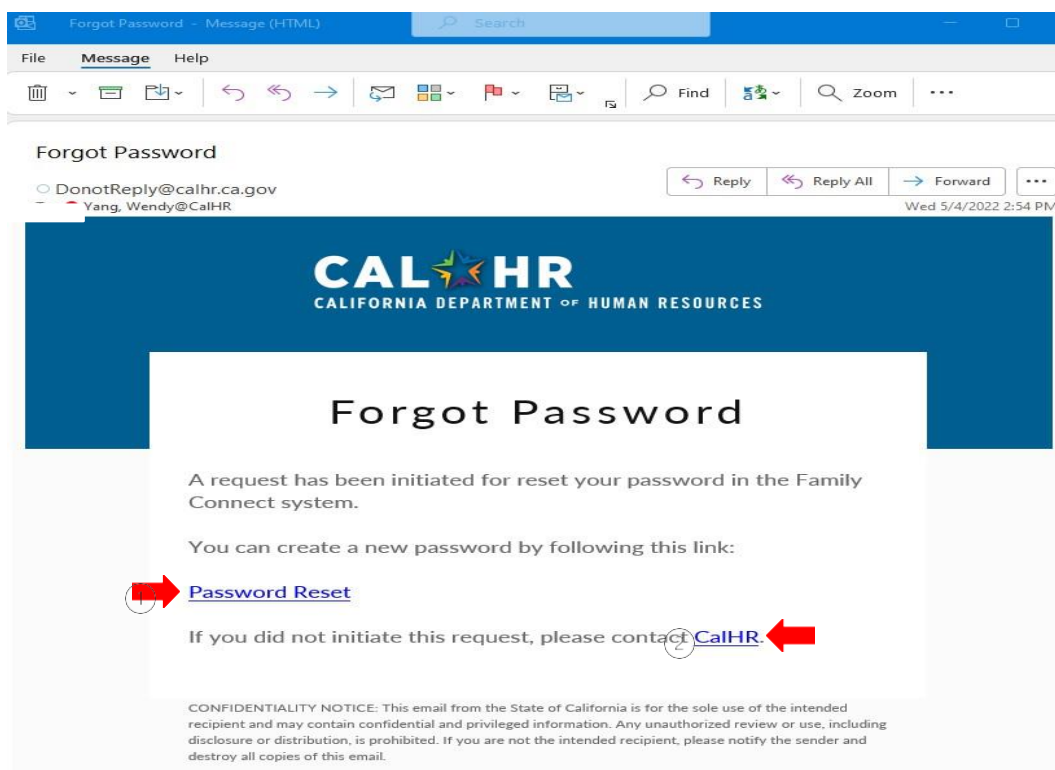
Once you have submitted your “Forgot Password” request, you will receive an email link to create a new password.



The screenshot shows the 'Family Connect' website header with the California Department of Human Resources logo. Below the header, there is a 'Forgot Password' section. A green message box states: 'Email with password reset instructions has been sent.' Below this, there is a form labeled 'State Email Address (UserName) *' with the text 'wendy.yang@calhr.ca.gov' entered. There are 'Submit' and 'Cancel' buttons. At the bottom, there is a footer with links: 'Back to Top', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Contact Us'. The footer also includes the 'CALHR' logo, copyright information 'Copyright © 2022 State of California', version 'Version: STG_2022.5.2.1', and a publication date 'Published: 10/9/2020 11:09:45 AM'.

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

Settings

FAMILY CONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

Create Account / Log In

Change Password

1 New Password

2 Confirm New Password

3 Save Password Cancel

New Password must:
* be 8 or more characters long
* have at least one lower case letter
* have at least one upper case letter
* have at least one number

Back to Top Conditions of Use Privacy Policy Accessibility Contact Us

Copyright © 2022 State of California Version: STG_2022.5.2.1 Published: 10/9/2020 11:09:45 AM

Step 7:

The **FCP Main Page** is displayed.

Settings

FAMILY CONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Test?

Family Connect Portal (FCP)

Employees & Dependent Dashboard
Demographic & Enrollment Coverage Data

Demographic & Enrollment Exception Dashboard
Review Errors Requiring Resolutions

Dependent Eligibility Dashboard
DRV & 25 Year Age Out Alert

Please refer to the User Manual for instructions on how to use this application. If you need assistance, contact the Family Connect team at DRV@CalHR.ca.gov

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

CAL HR
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

Changed Password

The password tied to your account in the Family Connect system has been updated.

Please make note of your new password in a secure location.

If you did not recently update your password, please contact [CalHR](#) to investigate any suspicious activity on your account.

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.

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.

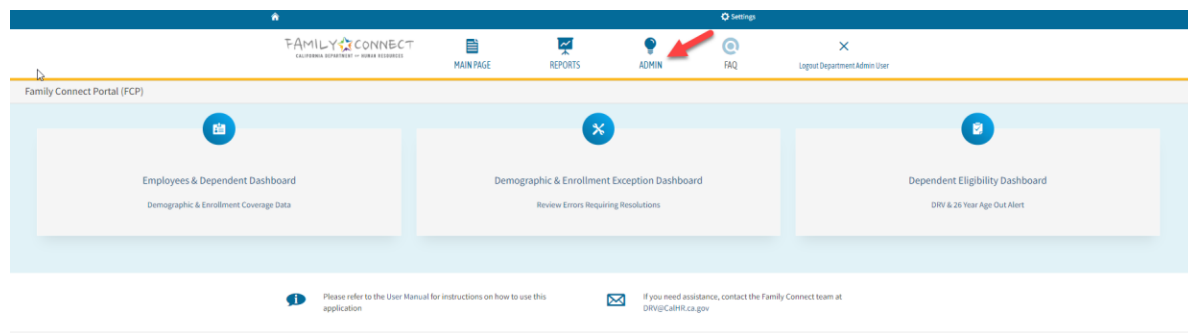
All users can access the **Modify My Account** icon.

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

Step Actions

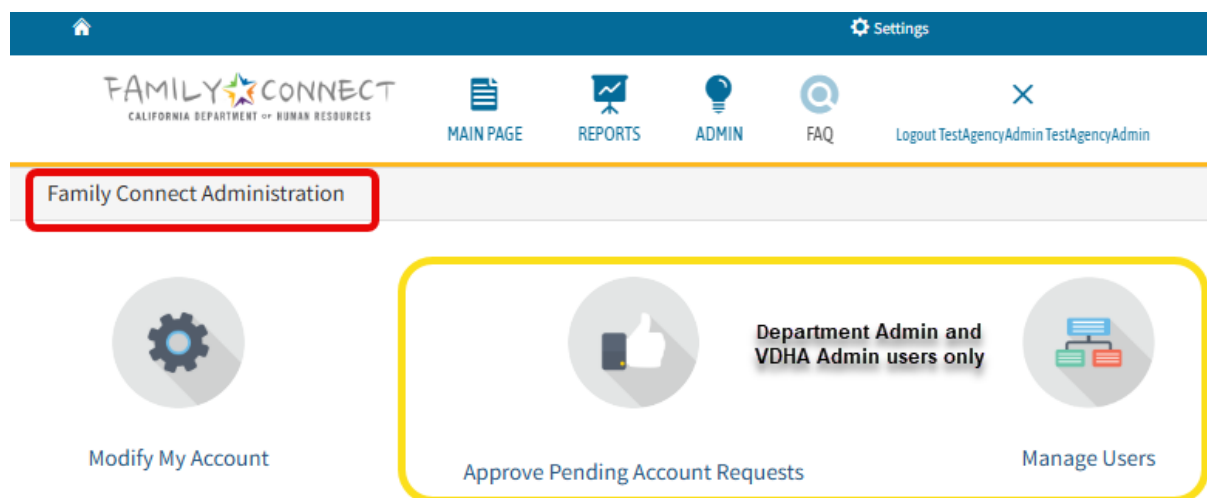
Step 1:

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.

Include disabled user accounts

Create New User Show 10 rows Export

Search:

Agency List	Login	User ID	First Name	Last Name	SCO Agency Codes	Job Title	Role(s)	Status
	VdhaTestAccount@calhr.ca.gov	***a9db	Jane	Doe	275	Staff Services Analyst	VDHA	
	NewRole@calhr.ca.gov	***ff62	Snow	White	275	supervisor	VDHA Admin	
	TestVDHAAdmin@calhr.ca.gov	***286a	Tinker	Bell	275	Staff Services Manager III	VDHA Admin	

Showing 1 to 3 of 3 entries

Previous 1 Next

*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.

Include disabled user accounts

Create New User Show 10 rows Export

Search:

Agency List	Login	User ID	First Name	Last Name	SCO Agency Codes	Job Title	Role(s)	Status
	VdhaTestAccount@calhr.ca.gov	***a9db	Jane	Doe	275	Staff Services Analyst	VDHA	
	NewRole@calhr.ca.gov	***ff62	Snow	White	275	supervisor	VDHA Admin	
	TestVDHAAdmin@calhr.ca.gov	***286a	Tinker	Bell	275	Staff Services Manager III	VDHA Admin	

Showing 1 to 3 of 3 entries

Previous 1 Next

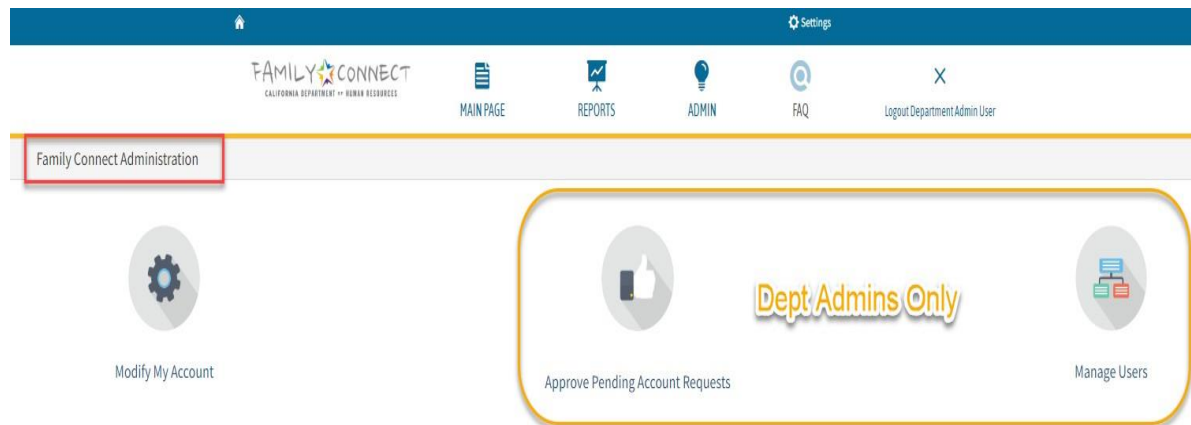
Modify My Account

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.

The screenshot displays the 'Update Existing User' form. At the top, the 'Update Existing User' tab is highlighted. The form is organized into several sections. The first section contains input fields for 'First Name *' (with 'Department' as a placeholder), 'Middle Name' (with 'Admin' as a placeholder), and 'Last Name *' (with 'User' as a placeholder). Below these is the 'Email (Username) *' field, which is pre-filled with 'department-admin@calhr.ca.gov'. The 'Phone Number *' field has a placeholder '(999) 999-1234'. The 'Job Title' field has a placeholder 'Tester'. The 'Classification *' field is a dropdown menu currently showing 'PERSONNEL SUPERVISOR I'. Below this is a checked checkbox for 'Can Access Child Departments'. The 'User Role *' field is a dropdown menu showing 'Department Admin'. The 'Access Department *' section shows a list of departments with checkboxes, including '003-STATUTORY OFFICERS JUDGE'S RET SYS MEM', '006-MILITARY DEPARTMENT', '014-DEPT OF FOOD & AGRICULTURE', '024-ALCOHOLIC BEVERAGE CONTROL DEPT OF', '042-CORRECTIONS DEPT OF', '242-MILITARY DEPARTMENT', and '363-CALIFORNIA DEPARTMENT OF HUMAN RESOURCES'. A green checkmark and the text 'Account is currently unlocked' are displayed. The 'Change Password' section at the bottom includes a 'New Password' field and a 'Confirm Password' field. To the right of these fields are the requirements for the new password: 'New Password must: * be 8 or more characters long', '* have at least one lower case letter', '* have at least one upper case letter', and '* have at least one number'. At the bottom right, there are 'Save' and 'Close' buttons.

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.

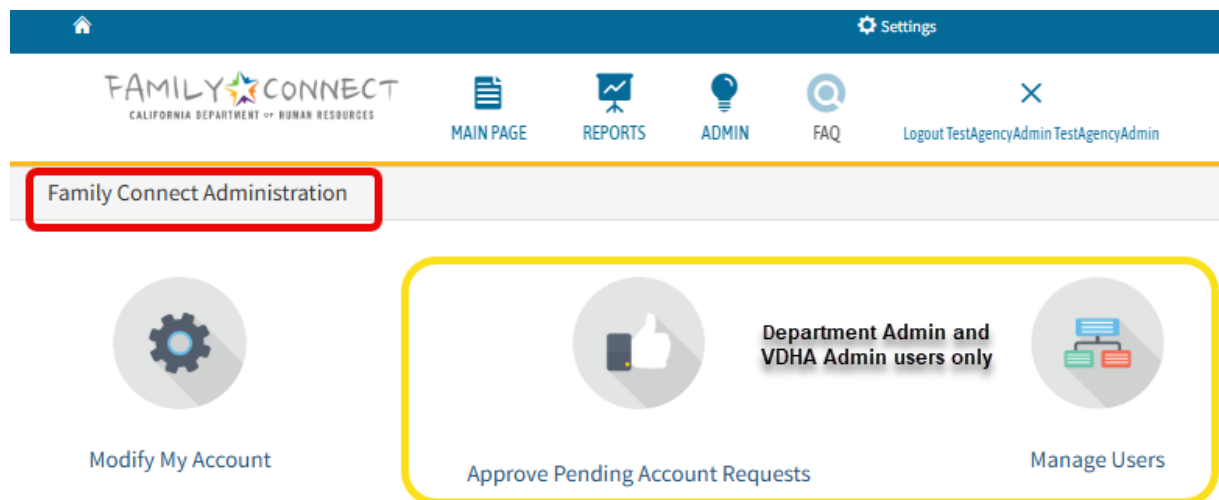
Note: Dept Admin will approve users for DRV transactions that will be Department Users. They can also approve Department User or Department User and VDHA, as those users will be authorized to be on the VDHA list in addition to completing DRV transactions. Dept Admin will not approve VDHA only accounts.

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.

Logout TestAgencyAdmin TestAgencyAdmin

Manage Users

☐ Include disabled user accounts

Create New User
Show 10 rows
Export

Search: VDHA

Agency List	Login	User ID	First Name	Last Name	SCO Agency Codes	Job Title	Role(s)	Status
	TrainingDepUser@Test.ca.gov	***1c0e	TestAgencyUser	TestAgencyUser	003, 904, 905, 999	Training Dep User	Department User, VDHA	
	testVdhaDepUser@Calhr.ca.gov	***8ed3	testVdhaDepUserFN	testVdhaDepUserLN	006	Staff Services Manager II	Department User, VDHA	
	testvdhadepuser2@calhr.ca.gov	***fd41	testvdhadepuser2FN	testtest	006	Staff Services Manager	Department User, VDHA	

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.

Logout TestAgencyAdmin TestAgencyAdmin

Update Existing User

User ID
***1c0e

First Name *
TestAgencyUser

Middle Name

Last Name *
TestAgencyUser

Email (UserName) *
TrainingDepUser@Test.ca.gov

Phone Number *
(353) 453-4555

Job Title
Training Dep User

Classification *
ACCOUNTANT TRAINEE

User Role(s) *

Department User X
VDHA X

Access Department *

Clean Selected List
999-Test Agency X

Account is currently unlocked

☐ Account Disabled

☐ Send Password Reset Email

Save
Close

This completes Account deactivation and Password Reset scenarios.

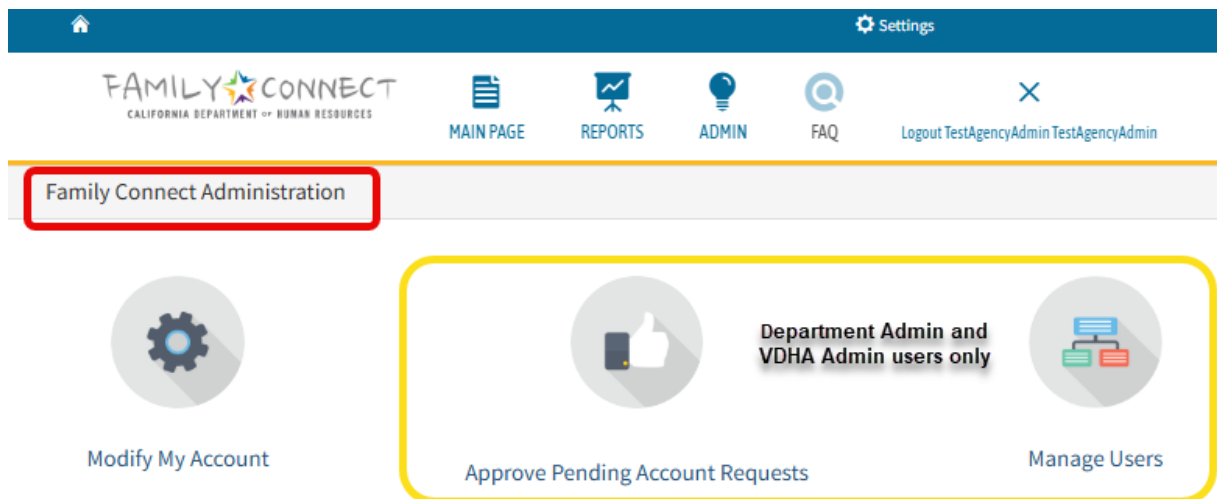
Review the **Create New User** account scenario.

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

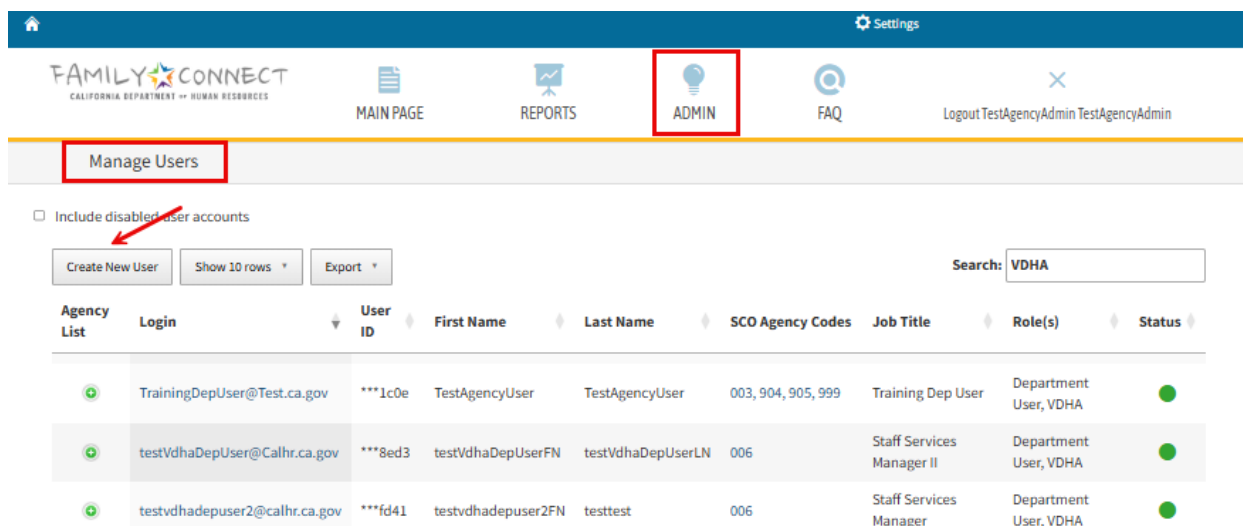
Step 1:

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.

The screenshot shows the 'New User' form in the Family Connect system. The form is titled 'New User' and is located under the 'ADMIN' tab. The form includes the following fields and options:

- First Name ***: Text input field.
- Middle Name**: Text input field.
- Last Name ***: Text input field.
- Email (UserName) ***: Text input field.
- Phone Number ***: Text input field.
- Job Title**: Text input field.
- Classification ***: Dropdown menu with the option '-- Select a Classification--'.
- Can Access Child Departments**: Checkbox.
- User Role ***: Dropdown menu with the option '-- Select a Role --'.
- Access Department ***: Text input field with a 'Clean Selected List' link.
- Send Password Reset Email**: Checked checkbox.

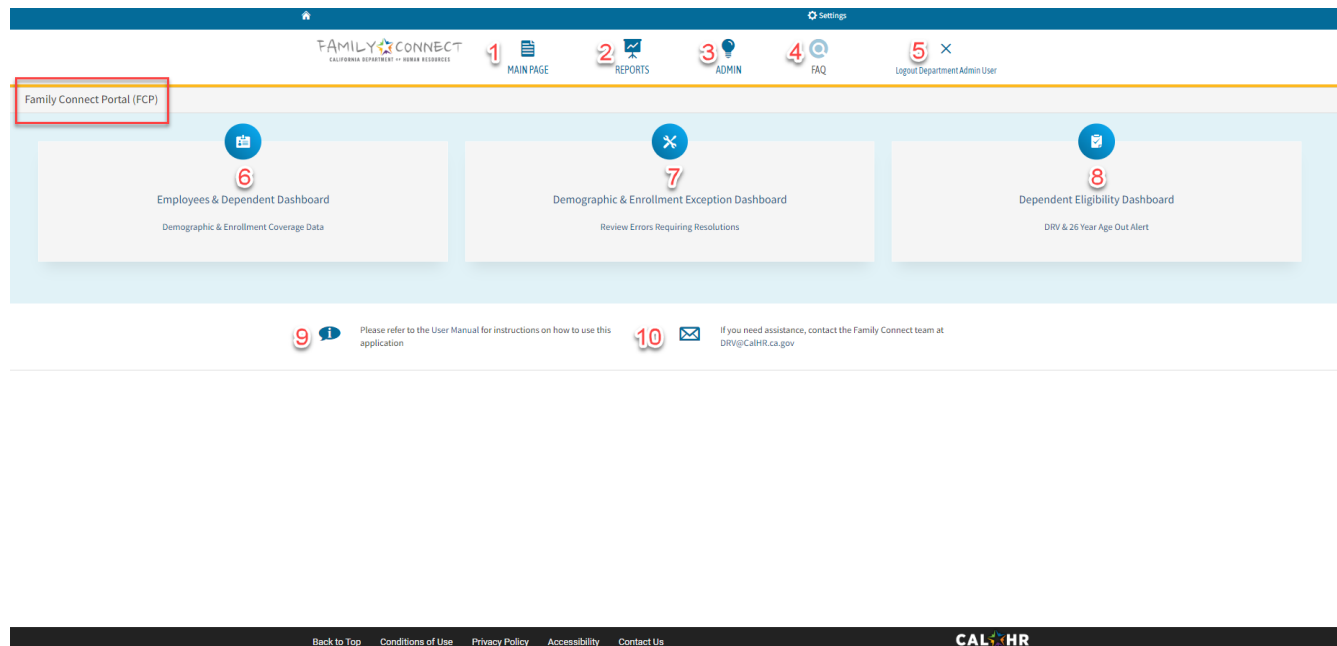
The 'Save' button is highlighted in blue, and the 'Close' button is in gray.

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

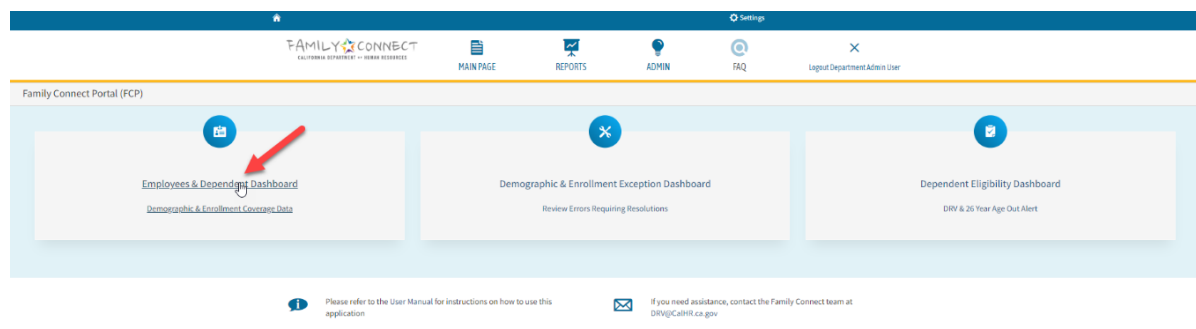
The Employees & Dependents Dashboard contains accounts of all employees who currently do not have a demographic & enrollment exception/error. Each employee is assigned an identification number (UEID). It is the same unique employee identification number that is used by the State Controller's Office (SCO).

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.

MANAGE FAMILY

☒ Show My Records Only (1)

Show 10 rows Export

Search: (2)

Dependents	UEID	Employee Name	DOB	Agency	Benefits	Assigned User	Comments
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Department User	07/17/2022 New Addi...

Showing 1 to 4 of 4 entries (filtered from 1,454 total entries)

Previous 1 Next

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.

MANAGE FAMILY

☐ Show My Records Only

Show 10 rows Export

Search:

Dependents	UEID	Employee Name	DOB	Agency	Benefits	Assigned User	Comments
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Dept User	04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Department User	07/17/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision		04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,		04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...
				003:STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...

Showing 1 to 10 of 1,453 entries

Previous 1 2 3 4 5 ... 146 Next

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

FAMILY CONNECT
 CALIFORNIA RETIREMENT • PUBLIC RECORDS

MAIN PAGE

 REPORTS

 ADMIN

 FAQ

 Logout Department Admin User

MANAGE FAMILY

☐ Show My Records Only

Show 10 rows

Export

Search:

Dependents	UID#	Employee Name	DOB	Agency	Benefits	Assigned User	Comments
		ALDRIDGE, GEORGE A	5/22/1975	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Dept User	04/10/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
		ALDRIDGE, STEPHEN P	5/22/1988	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
Display Name Alldridge, Michelle	Dependent Type Spouse	DOB 5/22/1988	Re-verification End Date 3/31/2026	Benefits Dental	Exception No	Needs Review No	Deletion Status Pending Approval
Alldridge, Charles	Child	8/04/2003	8/31/2029	Dental	No	No	
Alldridge, Glenn	Child	5/22/2007	1/31/2033	Dental	No	No	Pending Approval
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	04/10/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Department User	07/17/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision		04/10/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,		04/10/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...
		ALDRIDGE, JIM, GEORGE D	5/22/1980	003-STATUTORY OFFICERS JUDGE'S RET SYS MEM			04/10/2022 New Addi...

Showing 1 to 10 of 1,454 entries

Previous

1 2 3 4 5 ... 146

 Next

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.

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

The screenshot shows the 'Review Employee' form in the FamilyConnect system. The form is divided into three main sections: Employee Information, Address, and Dependents. Red boxes and arrows highlight specific areas of interest:

- 1:** Points to the 'Review Employee' title bar at the top of the form.
- 2:** Points to the 'Dependent Plan' section, specifically the 'Dependent Plan Effective Date' field.
- 3:** Points to the 'Dependents' table at the bottom of the form, specifically the 'Status' column.

The 'Dependents' table contains the following data:

Dependent Name	Dependent Type	DOB	Birth/Expiration End Date	Benefit	Description	Health Revoke	Default Status
[Redacted]	Child	10/25/2005		Enrolled	No	No	Pending Approval
[Redacted]	Child	07/29/2009		Enrolled	No	No	
[Redacted]	Child	11/02/2007		Enrolled	No	No	

Section 1: Employee demographics

FAMILYCONNECT
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

MAIN PAGE REPORTS ADMIN FAQ Logout Department Admin User

Review Employee

UEID:
 SSN:
 First Name:
 Birth Date:

Status: Active
 Agency: 003-STATUTORY OFFICERS, JUDGE'S RET SYS MEM
 Middle Name:
 Birth Month: September

Last Name:
 Assigned To: Dept User

#1 - Employee Demographics

Employee Mailing Address

Address line 1:
 Address line 2:
 City: State: CALIFORNIA Zip Code:
☐ Undeliverable Undeliverable Date: Undeliverable User Name:

Comments

04/10/2022 New Addition from EntHR database

2

Section 2: Benefits Enrollment Information

Dental Plan

Dental Plan Name: Delta Preferred Provider Option (PPO)
 Dental Plan Effective Date: 1/1/2022
 Dental Party Code: Self plus two or more dependents

Dental BENID:
 Dental Permitting Event: -- Record Source --

Vision Plan

Vision Plan Name: Not Covered
 Vision Plan Effective Date:
 Vision Party Code: -- Vision Party Code --

Vision BENID:
 Vision Permitting Event: -- Record Source --

#2 - Benefits Information

Section 3: Dependent Information

Show 10 rows Export #3 - Dependent Information Search:

Dependent Name	Dependent Type	DOB	Re-verification End Date	Benefits	Exception	Needs Review	Deletion Status
	Child		8/31/2029	Dental	No	No	
	Child		1/31/2033	Dental	No	No	Pending Approval
	Spouse		3/31/2026	Dental	No	No	Pending Approval

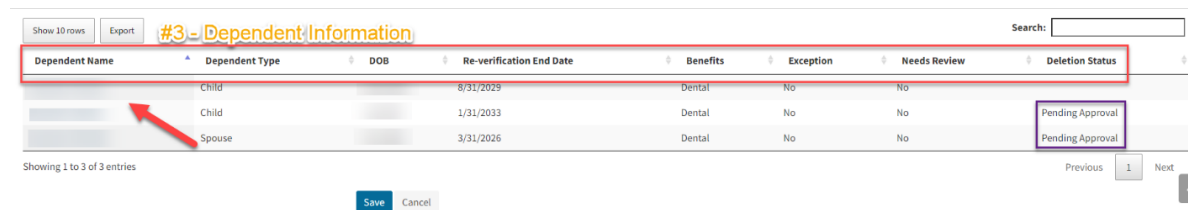
Showing 1 to 3 of 3 entries

Previous 1 Next

Save Cancel

Step 7:

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



Dependent Name	Dependent Type	DOB	Re-verification End Date	Benefits	Exception	Needs Review	Deletion Status
	Child		8/31/2029	Dental	No	No	
	Child		1/31/2033	Dental	No	No	Pending Approval
	Spouse		3/31/2026	Dental	No	No	Pending Approval

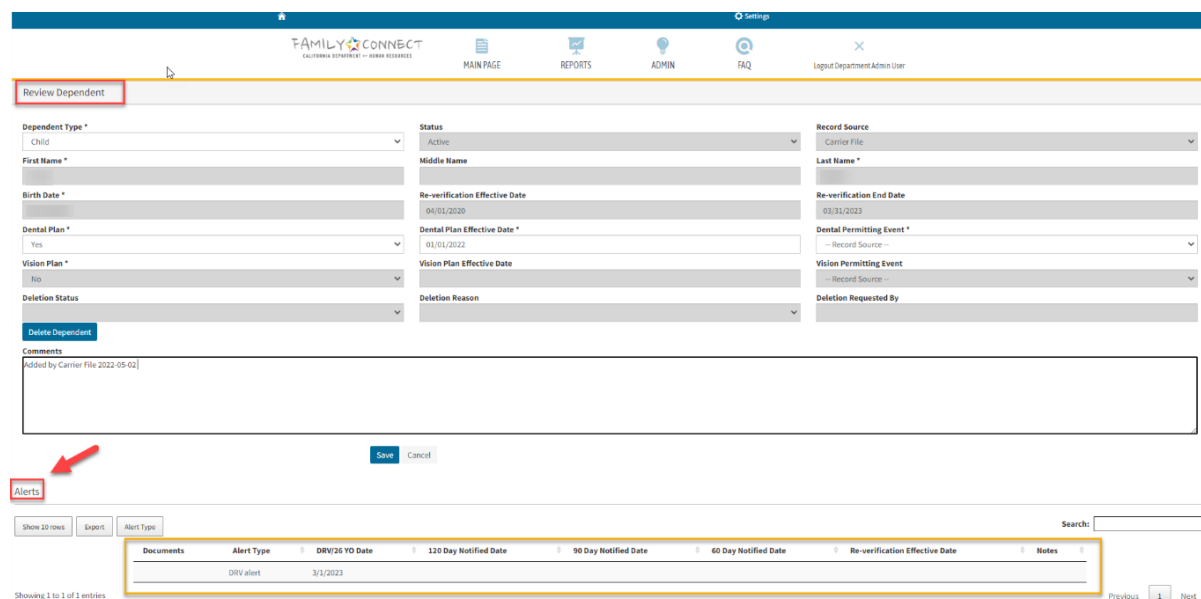
Showing 1 to 3 of 3 entries

Save Cancel

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.



Review Dependent

Dependent Type *
Child

First Name *
Middle Name

Birth Date *
Re-verification Effective Date
04/01/2020

Dental Plan *
Yes

Vision Plan *
No

Deletion Status

Status
Active

Middle Name

Re-verification Effective Date
04/01/2020

Dental Plan Effective Date *
01/01/2022

Vision Plan Effective Date

Deletion Reason

Record Source
Carrier File

Last Name *

Re-verification End Date
03/31/2023

Dental Permitting Event *
Record Source

Vision Permitting Event
Record Source

Deletion Requested By

Delete Dependent

Comments
Added by Carrier File 2022-05-02

Save Cancel

Alerts

Show 10 rows Export Alert Type

Documents	Alert Type	DRV/26 YO Date	120 Day Notified Date	90 Day Notified Date	60 Day Notified Date	Re-verification Effective Date	Notes
	DRV alert	8/1/2023					

Showing 1 to 1 of 1 entries

Previous 1 Next

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.

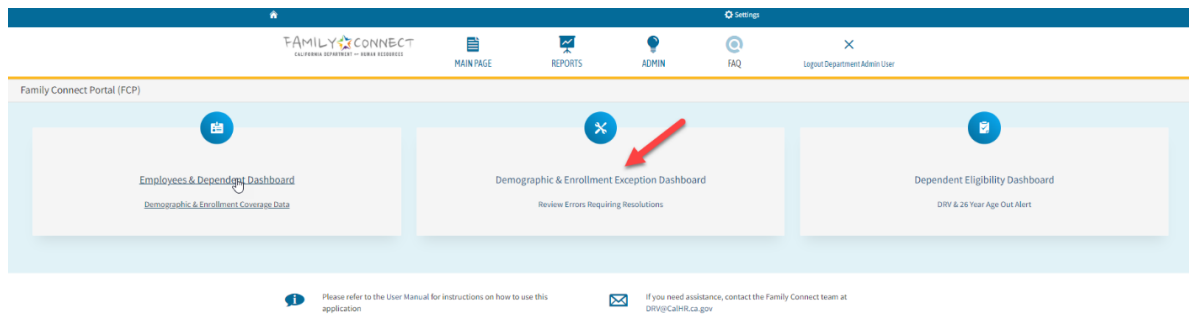
The employee's account is updated when FCP receives a vendor file for that employee or their dependent with demographic information that doesn't match the information in FCP that was provided by SCO

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).

MANAGE FAMILY EXCEPTIONS

☒ Show My Records Only

Show 10 rows Export

Search:

Dependents	Employee Name	DOB	Agency	Benefits	Assigned User	Needs Verification	Exception Comments
			003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	No	Processing Not Cover...
			003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	No	Processing Not Cover...

Showing 1 to 2 of 2 entries (filtered from 4,494 total entries)

Previous 1 Next

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.

MANAGE FAMILY EXCEPTIONS

☒ Show My Records Only

Show 10 rows Export

Search:

Dependents	Employee Name	DOB	Agency	Benefits	Assigned User	Needs Verification	Exception Comments
			003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	No	Processing Not Cover...
			003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	No	Processing Not Cover...

Showing 1 to 2 of 2 entries (filtered from 4,494 total entries)

Previous 1 Next

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.





 MAIN PAGE
  REPORTS
  ADMIN
  FAQ
  Logout Department User

MANAGE FAMILY EXCEPTIONS

☒ Show My Records Only

Show 10 rows

Export

Search:

Dependents	Employee Name	DOB	Agency	Benefits	Assigned User	Needs Verification	Exception Comments
			003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	No	Processing Not Cover...
			003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Department User	No	Processing Not Cover...

Showing 1 to 2 of 2 entries (Filtered from 4,494 total entries)

Previous

1

 Next

Step 6:

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

The screenshot shows the 'Review Exception Employee' page with three main sections highlighted by colored boxes and numbered arrows:

- Section 1: Employee Demographics** (Green box, arrow 1): Includes fields for UID, Status, Agency, First Name, Middle Name, Last Name, Birth Date, Birth Month, Assigned To, Employee Mailing Address (Address line 1, Address line 2, City, State, Zip Code, Undeliverable, Undeliverable Date, Undeliverable User Name), and Comments.
- Section 2: Dental & Premier Vision Plan Info** (Purple box, arrow 2): Includes fields for Dental Plan Name, Dental Plan Effective Date, Dental Party Code, Dental BENID, Vision Plan Name, Vision Plan Effective Date, Vision Party Code, and Vision BENID.
- Section 3: Dependent Information** (Orange box, arrow 3): Includes a table for Dependents with columns for Dependent Name, Dependent Type, EOB, No verification End Date, Benefits, Exception, Health Revoke, and Exclusion Status.

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).

This screenshot focuses on the 'Exception Comments' section of the 'Review Exception Employee' page. A red box highlights the 'Exception Comments' area, which contains a list of error messages:

- Processing Not Covered to Covered Dental...
- 2022-04-26 Dental File Delta Contains Mismatched Field(s). Carrier File Data shows LastName: [redacted]; First Name: C; Birthday: [redacted] Processing Previously Covered Dental...
- 2022-04-29 Dental File Delta Contains Mismatched Field(s). Carrier File Data shows LastName: [redacted]; First Name: [redacted]; Birthday: [redacted] Processing Previously Covered Dental...
- 2022-05-02 Dental File Delta Contains Mismatched Field(s). Carrier File Data shows LastName: [redacted]; First Name: [redacted]; Birthday: [redacted] Processing Previously Covered Dental...
- 2022-05-05 Dental File Delta Contains Mismatched Field(s). Carrier File Data shows LastName: [redacted]; First Name: [redacted]; Birthday: [redacted] Processing Previously Covered Dental...
- 2022-05-06 Dental File Delta Contains Mismatched Field(s). Carrier File Data shows LastName: [redacted]; First Name: [redacted]; Birthday: [redacted] Processing Previously Covered Dental...

Section 2: Benefits Enrollment Information

This screenshot focuses on the 'Dental Plan' and 'Vision Plan' sections of the 'Review Exception Employee' page. A red box highlights the 'Dental Plan' section, which includes fields for Dental Plan Name, Dental Plan Effective Date, Dental Party Code, Dental BENID, and Dental Permitting Event. A purple box highlights the 'Vision Plan' section, which includes fields for Vision Plan Name, Vision Plan Effective Date, Vision Party Code, and Vision BENID.

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.

Review Dependent

Dependent Type *
Child

Status
Pending

Record Source
Carrier File

First Name *

Middle Name

Last Name *

Birth Date *

Dental Plan *
Yes

Vision Plan *
No

Deletion Status

Re-verification End Date

Dental Permitting Event *
-- Record Source --

Vision Permitting Event
-- Record Source --

Deletion Requested By

Comments
Added by Carrier File 2022-09-07

Delete Dependent

Save Cancel

Edit Deletion

If you are sure that you want to delete this dependent then select correct deletion reason and click Save

Deletion Reason
-- Select Deletion Reason Type --

- Duplicate Dependent
- Incorrect Date of Birth
- Incorrect First Name
- Incorrect Last Name
- Ineligible Dependent
- Not a Dependent of Employee

Step 8c:
Select **Save**.

Review Dependent

Dependent Type *
Spouse

Status
Active

Record Source
Carrier File

First Name *

Middle Name

Last Name *

Birth Date *

Dental Plan *
Yes

Vision Plan *
No

Deletion Status

Re-verification End Date
01/31/2024

Dental Permitting Event *
-- Record Source --

Vision Permitting Event
-- Record Source --

Deletion Requested By

Comments
Added by Carrier File 2022-05-02

Delete Dependent

Save Cancel

Edit Deletion

If you are sure that you want to delete this dependent then select correct deletion reason and click Save

Deletion Reason
Incorrect Last Name

Save Close

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

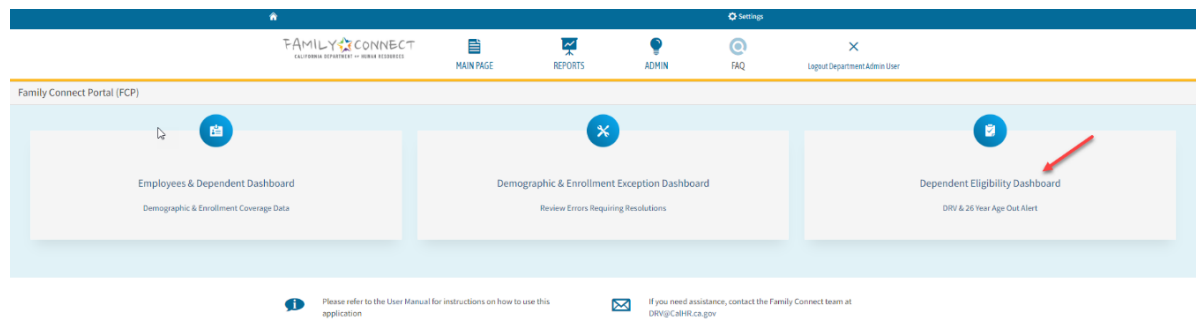
The **Dependent Eligibility Dashboard** contains accounts of all employees with dependent(s) who require re-verification based on the DRV schedule and/or have dependent child(ren) who are within 0-4 months of nearing age 26.

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.

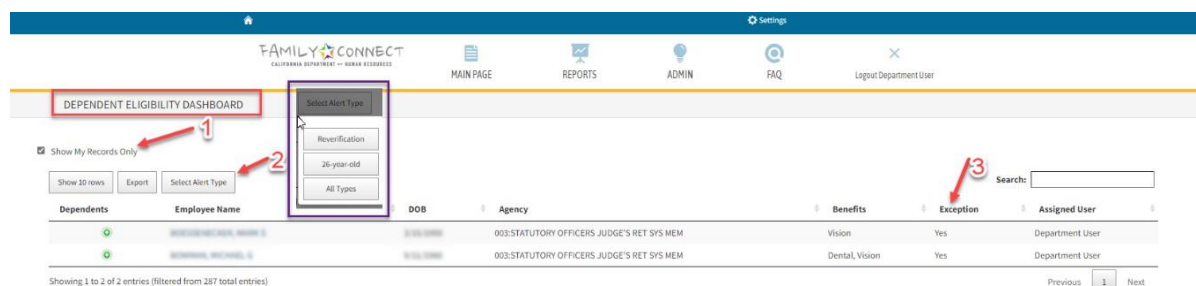


Step 2:

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.

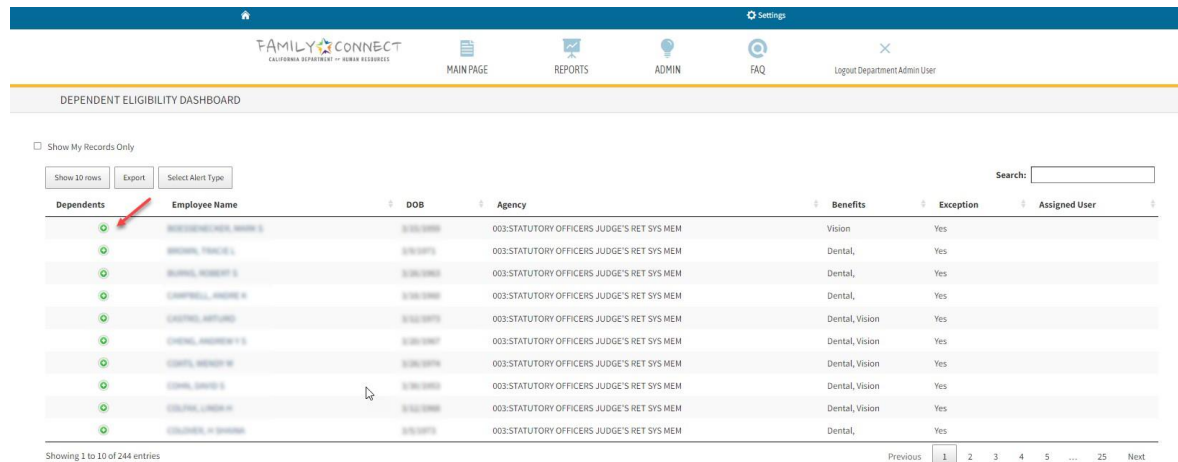
In addition, in this Dashboard, the **Exception** column (#3) will have a **Yes/No** value depending on whether there are any exceptions/errors on this employee's account. If the Exception column indicates Yes, then this employee's account is also in the **Demographic and Enrollment Exceptions Dashboard**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



DEPENDENT ELIGIBILITY DASHBOARD

☐ Show My Records Only

Show 10 rows Export Select Alert Type Search:

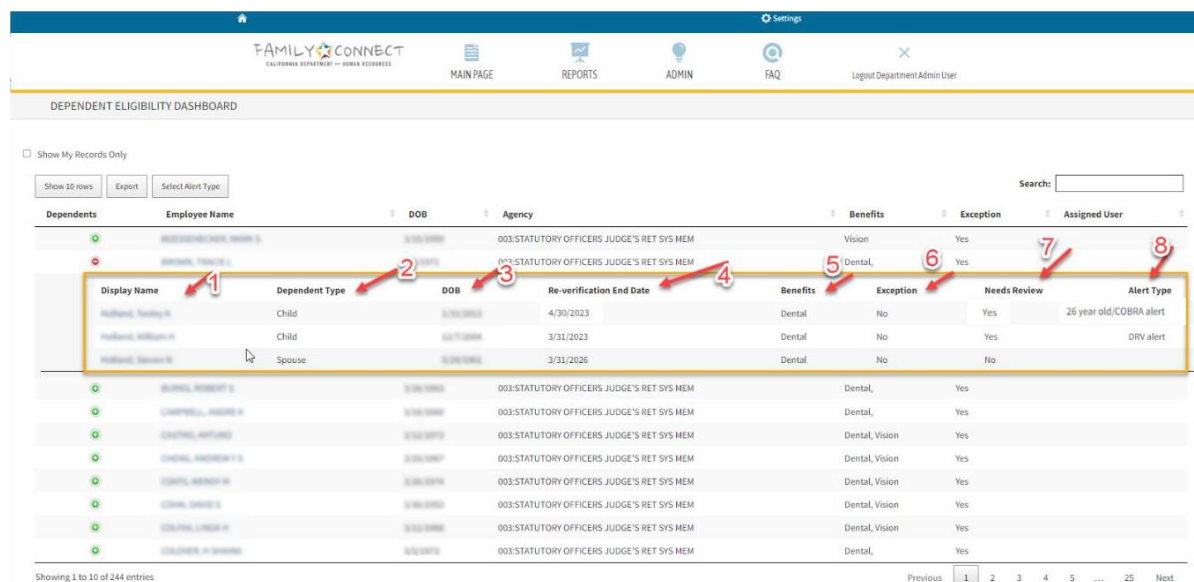
Dependents	Employee Name	DOB	Agency	Benefits	Exception	Assigned User
	BRIDGES, TRACIE L	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Vision	Yes	
	BRIDGES, TRACIE L	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes	
	BRIDGES, ROBERT S	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	

Showing 1 to 10 of 244 entries Previous 1 2 3 4 5 ... 25 Next

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



DEPENDENT ELIGIBILITY DASHBOARD

☐ Show My Records Only

Show 10 rows Export Select Alert Type Search:

Dependents	Employee Name	DOB	Agency	Benefits	Exception	Assigned User
	BRIDGES, TRACIE L	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Vision	Yes	
	BRIDGES, TRACIE L	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes	
	BRIDGES, ROBERT S	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW R	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	

Showing 1 to 10 of 244 entries Previous 1 2 3 4 5 ... 25 Next

This completes the Dependent Eligibility Dashboard overview scenario.

5.0 Dependent Re-Verification Process

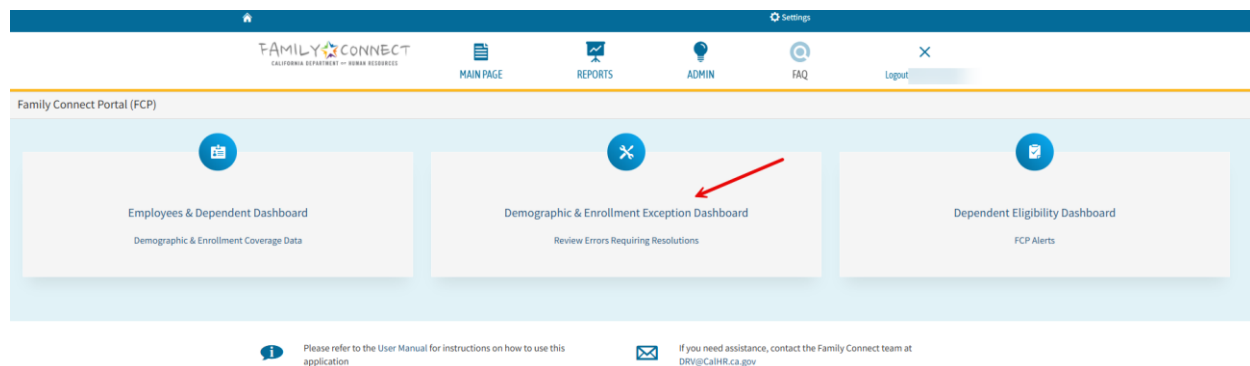
The re-verification of dependents enrolled in dental and/or premier vision is processed in the **Dependent Eligibility Dashboard**.

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.

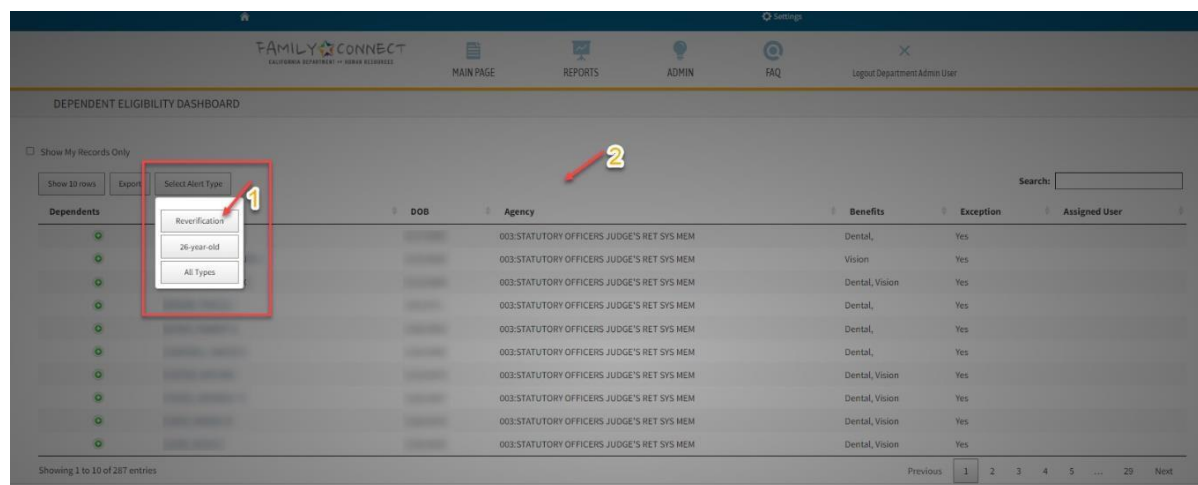
You have the option to filter by alert type by clicking on the **Select Alert Type** button (#2). This will give you three options: Reverification, 26- year-old, and All types.



Step 3:

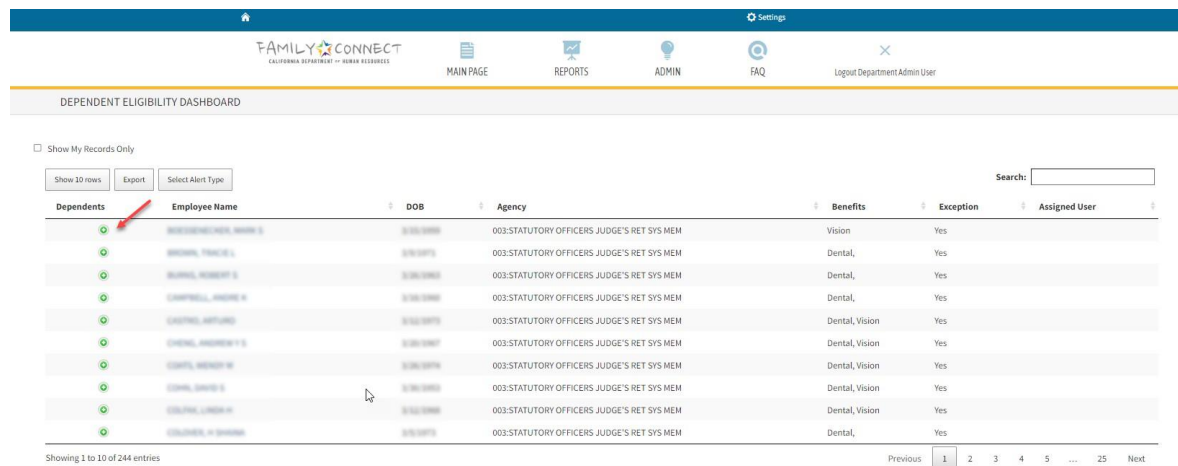
From the Select Alert Type menu, click on the **Reverification** button (#1). Within a few seconds, the Dependent Eligibility Dashboard is filtered and only shows dependent(s) scheduled for the current re-verification cycle based on the DRV schedule.

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.



DEPENDENT ELIGIBILITY DASHBOARD

☐ Show My Records Only

Show 10 rows Export Select Alert Type Search:

Dependents	Employee Name	DOB	Agency	Benefits	Exception	Assigned User
	BROWN, THOMAS L	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Vision	Yes	
	BROWN, ROBERT S	3/26/1962	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental	Yes	
	CAMPBELL, ANDREW R	3/16/1966	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental	Yes	
	CAMPBELL, ARTHUR	3/12/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW Y S	3/28/1967	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, ANDREW W	3/26/1974	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, DAVID S	3/16/1962	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, LINDA H	3/12/1966	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes	
	CAMPBELL, H SHARON	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental	Yes	

Showing 1 to 10 of 244 entries

Previous 1 2 3 4 5 ... 25 Next

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.

Settings

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DEPENDENT ELIGIBILITY DASHBOARD

Show My Records Only

Show 10 rows

Export

Select Alert Type

Search:

Dependents	Employee Name	DOB	Agency	Benefits	Exception	Assigned User																								
	BROWN, THOMAS L	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes																									
	BROWN, ROBERT S	3/26/1962	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes																									
	CAMPBELL, ANDREW R	3/16/1966	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes																									
<table><tr><th>Display Name</th><th>Dependent Type</th><th>DOB</th><th>Re-verification End Date</th><th>Benefits</th><th>Exception</th><th>Needs Review</th><th>Alert Type</th></tr><tr><td>CAMPBELL, ARTHUR</td><td>Child</td><td>3/12/1975</td><td>3/31/2023</td><td>Dental, Vision</td><td>No</td><td>Yes</td><td>DRV alert</td></tr><tr><td>CAMPBELL, ANDREW</td><td>Spouse</td><td>3/16/1966</td><td>3/31/2023</td><td>Dental,</td><td>No</td><td>Yes</td><td>DRV alert</td></tr></table>							Display Name	Dependent Type	DOB	Re-verification End Date	Benefits	Exception	Needs Review	Alert Type	CAMPBELL, ARTHUR	Child	3/12/1975	3/31/2023	Dental, Vision	No	Yes	DRV alert	CAMPBELL, ANDREW	Spouse	3/16/1966	3/31/2023	Dental,	No	Yes	DRV alert
Display Name	Dependent Type	DOB	Re-verification End Date	Benefits	Exception	Needs Review	Alert Type																							
CAMPBELL, ARTHUR	Child	3/12/1975	3/31/2023	Dental, Vision	No	Yes	DRV alert																							
CAMPBELL, ANDREW	Spouse	3/16/1966	3/31/2023	Dental,	No	Yes	DRV alert																							
	CAMPBELL, ARTHUR	3/12/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes																									
	CAMPBELL, ANDREW Y S	3/28/1967	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes																									
	CAMPBELL, ANDREW W	3/26/1974	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes																									
	CAMPBELL, DAVID S	3/16/1962	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes																									
	CAMPBELL, LINDA H	3/12/1966	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes																									
	CAMPBELL, H SHARON	3/15/1975	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental,	Yes																									
	CAMPBELL, PATRICIA A	3/15/1962	003:STATUTORY OFFICERS JUDGE'S RET SYS MEM	Dental, Vision	Yes																									

Showing 1 to 10 of 244 entries

Previous

1

2

3

4

5

...

25

Next

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.

Review Dependent

Dependent Type *
Child

First Name *
Middle Name
Last Name *

Birth Date *
04/01/2020

Dental Plan *
Yes

Vision Plan *
No

Deletion Status
No

Status
Active

Re-verification Effective Date
06/01/2022

Re-verification End Date
03/31/2023

Record Source
Carrier File

Dental Permitting Event *
-- Record Source --

Vision Permitting Event
-- Record Source --

Deletion Reason
No

Deletion Requested By
No

Comments
Added by Carrier File 2022-09-07

Alerts

Documents	Alert Type	DRV/26 YO End Date	120 Day Notified Date	90 Day Notified Date	60 Day Notified Date	Re-verification Effective Date	Notes
	DRV alert	3/31/2023					

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.

Family Connect
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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Edit DRV alert March 2023

Dependent Name: _____

Section #1 - Read Only

120 Day Notification: December 2022
☐ Is Notified 120 Day
 120 Day Notified Date: _____

90 Day Notification Date: January 2023
☐ Is Notified 90 Day
 90 Day Notified Date: _____

60 Day Notification: February 2023
☐ Is Notified 60 Day
 60 Day Notified Date: _____

#2 - Re-Verify Dependent

Verify Dependent
☐ Verified
 Re-verification Effective Date: _____

Notes

Verification Document List *

- ☐ Dependent Eligibility Verification Checklist (CalHR Form 781) *
- ☐ Adoption Certificate naming employee as the child's parent (i)
- ☐ Birth Certificate naming employee as the child's parent (i)

Save Cancel

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.

Verify Dependent

☐ Verified
 Re-verification Effective Date: _____

Notes

Verification Document List *

- ☐ Dependent Eligibility Verification Checklist (CalHR Form 781) *
- ☐ Adoption Certificate naming employee as the child's parent (i)
- ☐ Birth Certificate naming employee as the child's parent (i)

Save Cancel

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"

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Settings

Edit DRV alert March 2023

120 Day Notification: December 2022

☐ Is Notified 120 Day

120 Day Notified Date

90 Day Notification Date: January 2023

☐ Is Notified 90 Day

90 Day Notified Date

60 Day Notification: February 2023

☐ Is Notified 60 Day

60 Day Notified Date

Verify Dependent

☒ Verified

Re-verification Effective Date
4/1/2023

Notes

Verification Document List *

☒ Dependent Eligibility Verification Checklist (CalHR Form 781) *

☐ Adoption Certificate naming employee as the child's parent (i)

☐ Birth Certificate naming employee as the child's parent (i)

All Required documents must be selected

Save Cancel

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.

The screenshot displays the 'Edit DRV alert March 2023' page. At the top, there's a navigation bar with 'FAMILY CONNECT' logo and links for MAIN PAGE, REPORTS, ADMIN, FAQ, and a Logout button. Below the header, the page title is 'Edit DRV alert March 2023'. A green box highlights a 'Verification updated.' message. The main content area is divided into sections for 120 Day, 90 Day, and 60 Day notifications, each with a checkbox for 'Is Notified' and a corresponding date field. The 'Verify Dependent' section shows a checked 'Verified' status. The 'Re-verification Effective Date' is set to 4/1/2023. A red arrow points to this date field. Below this is a 'Notes' section. At the bottom, the 'Verification Document List' section shows three items: 'Dependent Eligibility Verification Checklist (CalHR Form 781) *' (checked), 'Adoption Certificate naming employee as the child's parent (I)' (unchecked), and 'Birth Certificate naming employee as the child's parent (I)' (checked). A red arrow points to this section. At the very bottom, there are 'Save' and 'Close' buttons.

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.

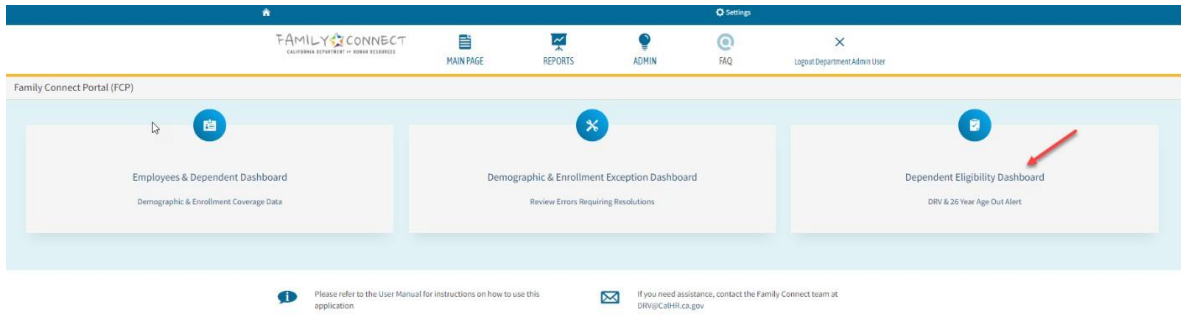
The **Dependent Eligibility Dashboard** contains accounts of all employees with dependent child(ren) who are within 0-4 months of nearing age 26. Departmental Personnel Offices are required to update each dependent account after notifications are sent to the employee.

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

Step Actions

Step 1:

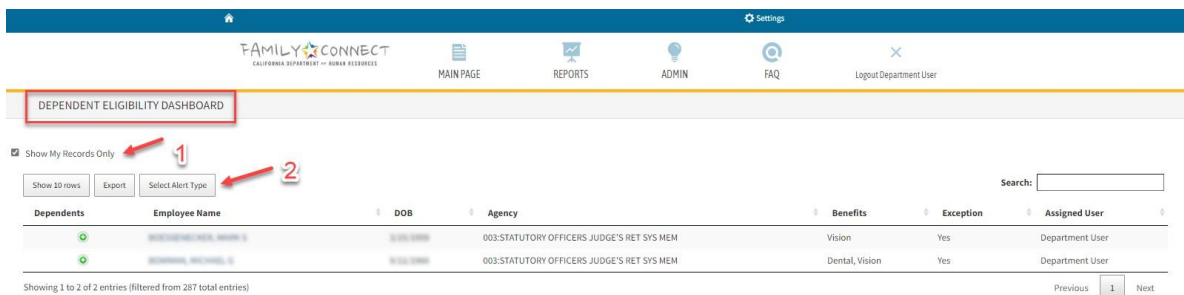
On the FCP Main Page, select the **Dependent Eligibility Dashboard** tab. The **Dependent Eligibility Dashboard** page displays.



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).

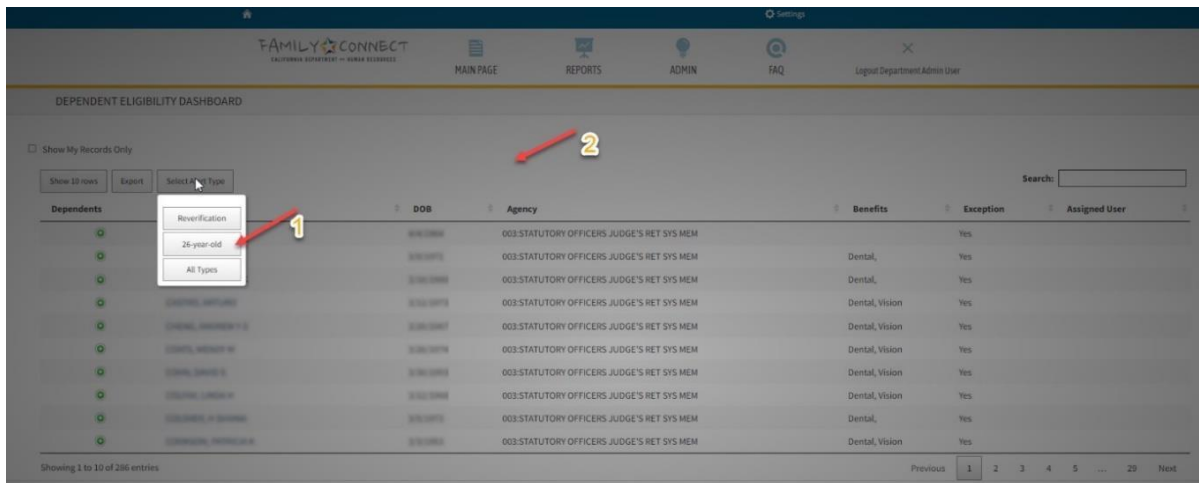
In this Dashboard, by default, you will see a combined list of all employees with dependents who require re-verification as well as all employees with dependents who are nearing age 26. You have the option to filter by alert type by clicking on the **Select Alert Type** button (#2). This will give you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



Step 3:

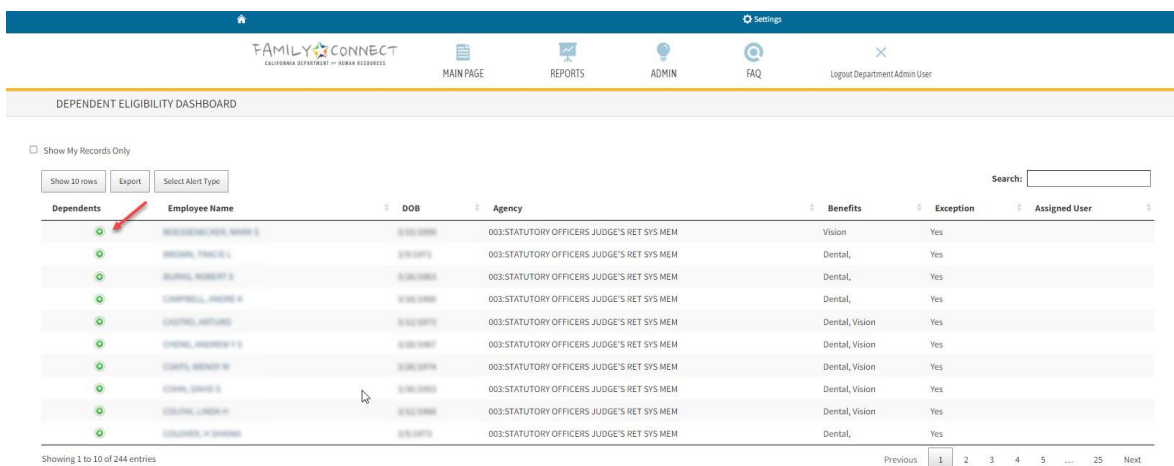
From the Select Alert Type menu, click on the **26-year-old** button (#1). Within a few seconds, the Dependent Eligibility Dashboard is filtered and only shows dependent(s) who are within 0-4 months of turning age 26.

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.

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**.

The screenshot displays the 'Edit 26 year old/COBRA alert' page. At the top, there is a navigation bar with 'FAMILY CONNECT' and 'CALIFORNIA DEPARTMENT OF HUMAN RESOURCES' logo, and links for 'MAIN PAGE', 'REPORTS', 'ADMIN', 'FAQ', and 'Logout Department Admin User'. Below the navigation bar, the page title 'Edit 26 year old/COBRA alert' is shown. The form contains the following fields:

- Dependent Name: [Redacted]
- Dependent Birth Date: 3/27/1997
- Dependent 26th Birthday: 3/27/2023
- 120 Day Notification: December 2022
- Is Notified 120 Day: ☒ (Highlighted with red arrow 1)
- 120 Day Notified Date: 12/09/2022
- 90 Day Notification Date: January 2023
- Is Notified 90 Day: ☐
- 90 Day Notified Date: [Redacted]
- 60 Day Notification/COBRA: February 2023
- Is Notified 60 Day/COBRA: ☐
- 60 Day Notified Date/COBRA: [Redacted]
- Notes: [Redacted]
- Save [Button] Cancel [Button] (Highlighted with red arrow 2)

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

7.0 Reports Tab

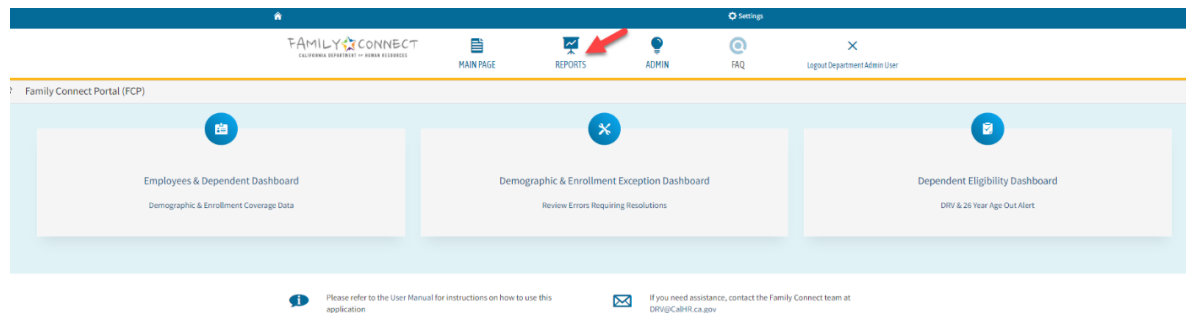
The Reports Tab in FCP provides several Reports for Departmental Personnel Offices use. All these reports can be exported into CSV and Excel.

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

Step Actions

Step 1:

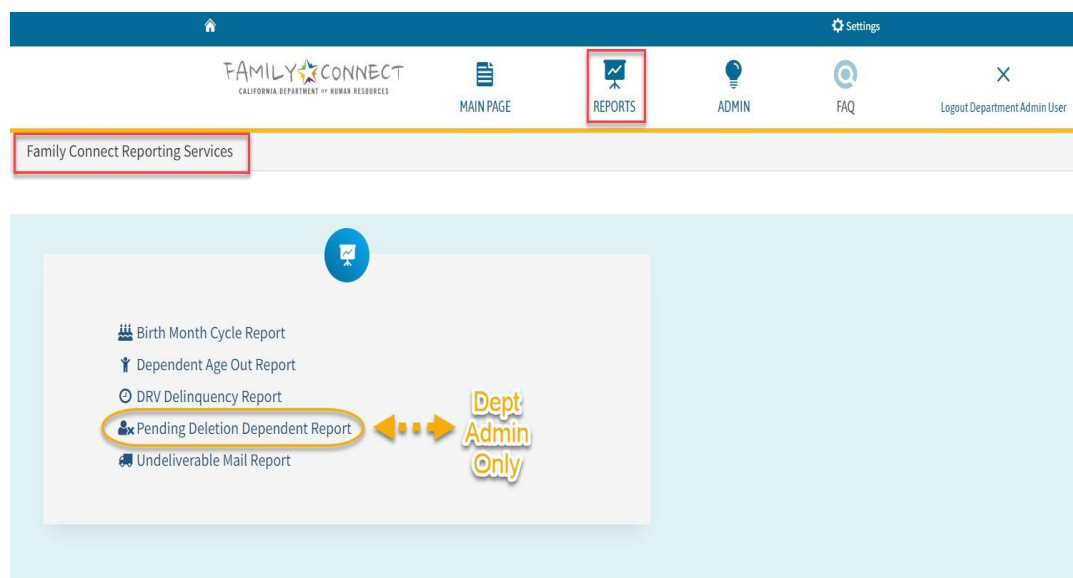
On the FCP Main Page, select the **REPORTS** tab. The **Family Connect Reporting Services** page will display.



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



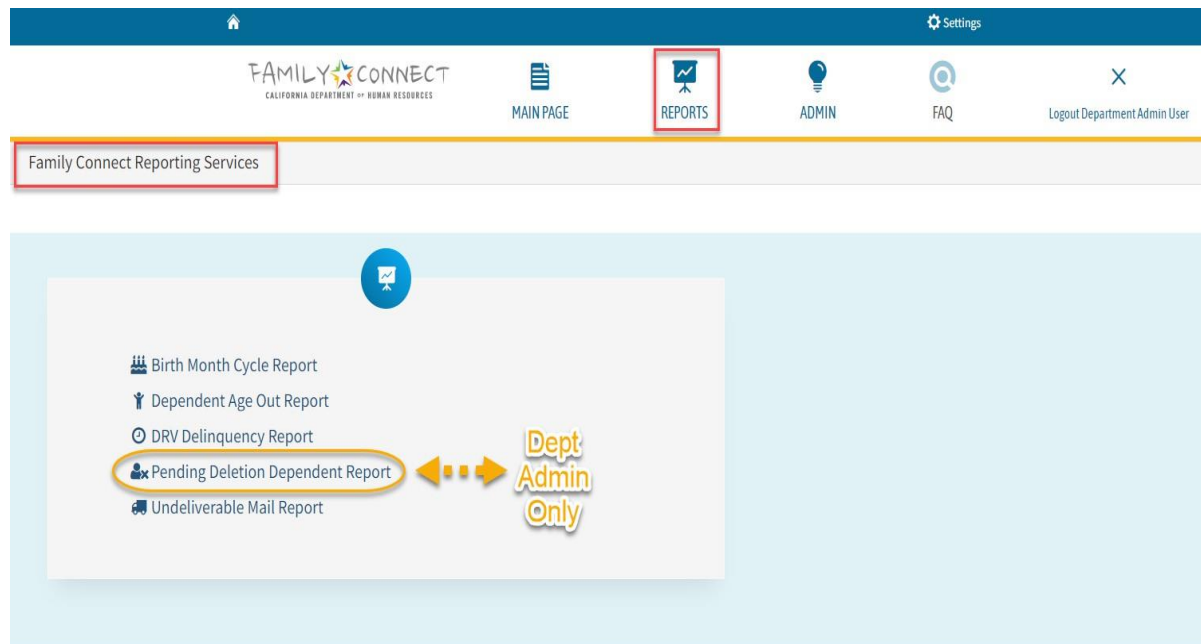
Birth Month Cycle Report

Review the Birth Month Cycle Report.

Step Actions

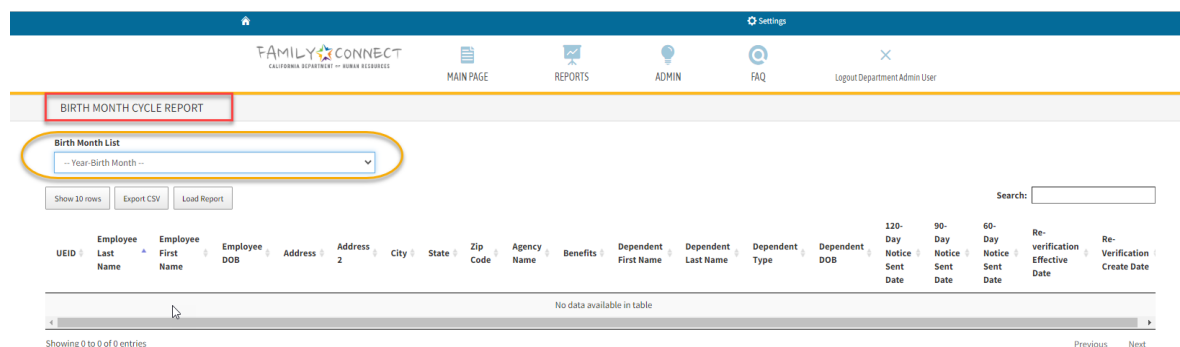
Step 1:

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:

BIRTH MONTH CYCLE REPORT

Birth Month List

-- Year-Birth Month --

2023-03
2023-06
2023-09
2023-12
2024-01
2024-04
2024-07
2024-10
2025-02
2025-05
2025-08
2025-11
2026-03
2026-06
2026-09
2026-12
2027-01
2027-04
2027-07

Search:

City	State	Zip Code	Agency Name	Benefits	Dependent First Name	Dependent Last Name	Dependent Type	Dependent DOB	120-Day Notice Sent Date	90-Day Notice Sent Date	60-Day Notice Sent Date	Re-verification Effective Date	Re-Verification Create Date
No data available in table													

Previous Next

Step 4:

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

BIRTH MONTH CYCLE REPORT

Birth Month List

2023-03

Show 10 rows Export CSV Load Report

Search:

UEID	Employee Last Name	Employee First Name	Employee DOB	Address	Address 2	City	State	Zip Code	Agency Name	Benefits	Dependent First Name	Dependent Last Name	Dependent Type	Dependent DOB	120-Day Notice Sent Date	90-Day Notice Sent Date	60-Day Notice Sent Date	Re-verification Effective Date	Re-Verification Create Date
No data available in table																			

Showing 0 to 0 of 0 entries Previous Next

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.

BIRTH MONTH CYCLE REPORT

Birth Month List

2023-03

Show 10 rows Export CSV Load Report

Search:

UEID	Employee Last Name	Employee First Name	Employee DOB	Address	Address 2	City	State	Zip Code	Agency Name	Benefits	Dependent First Name	Dependent Last Name	Dependent Type	Dependent DOB	120-Day Notice Sent Date	90-Day Notice Sent Date	60-Day Notice Sent Date	Re-verification Effective Date	Re-Verification Create Date
			03/15/1967				CA		DEPT OF STATE HOSPITALS-METROPOLITAN	Dental			Spouse	01/05/1957					
			03/10/1975				CA		CORRECTIONS DEPT OF	Dental			Spouse	11/13/1970					
			03/10/1975				CA		CORRECTIONS DEPT OF	Dental			Spouse	11/30/1970					

This completes the Birth Month Cycle Report overview scenario.

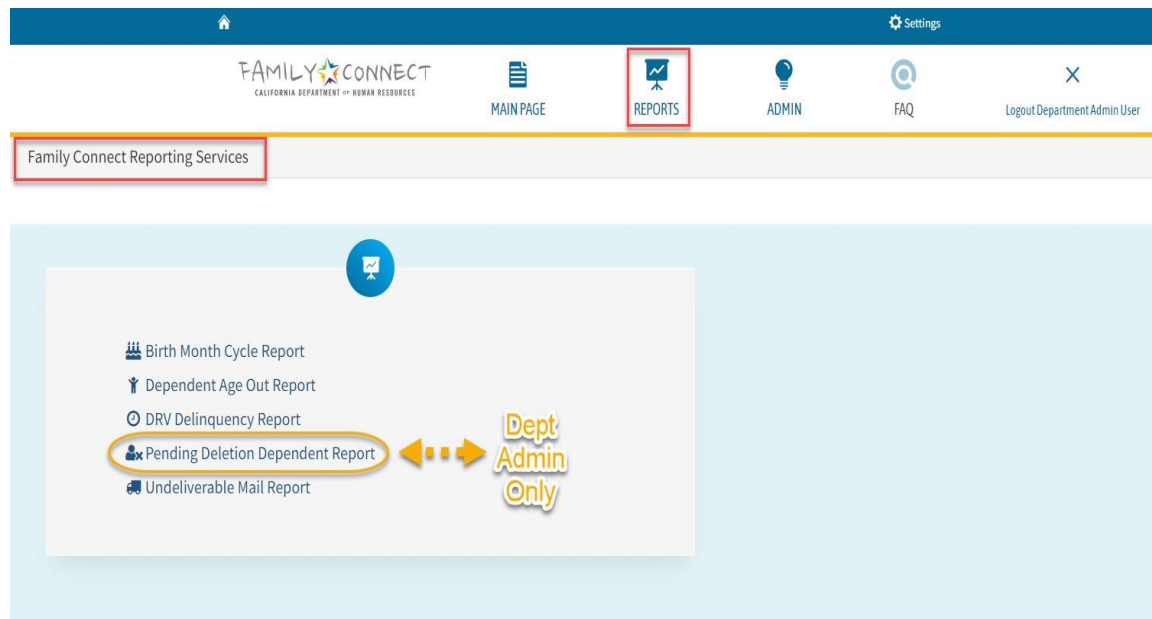
Dependent Age Out Report

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.

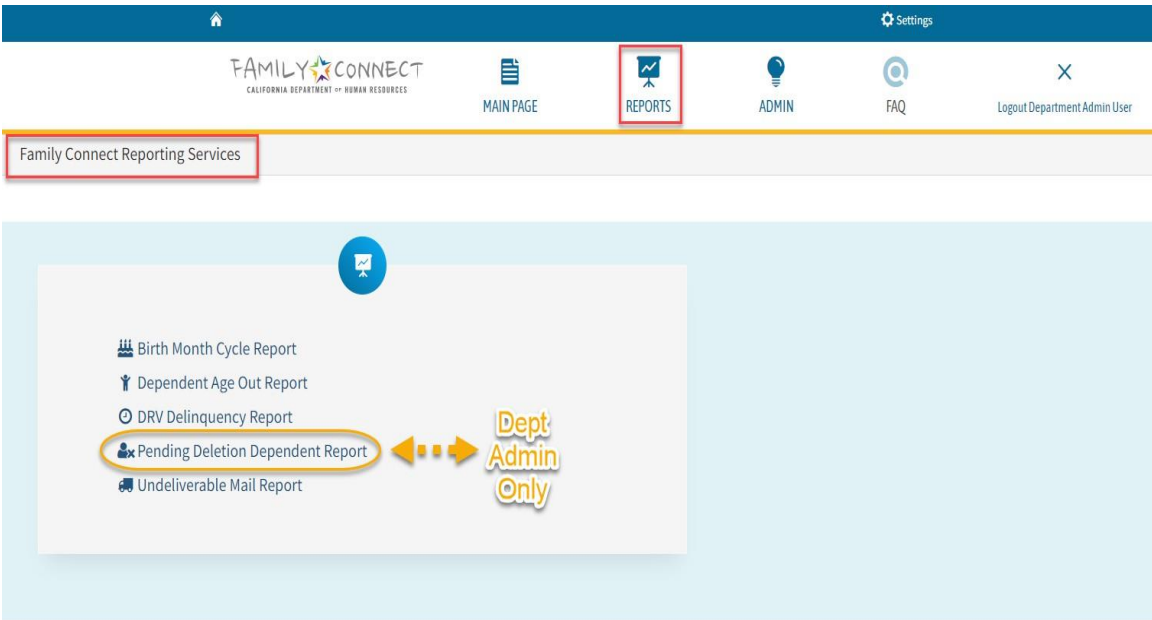
Dependents will remain on this report until the vendor removes them from benefits. All deletion requests must be submitted to the vendor and/or SCO. **Dependent children must be removed from dental and premier vision benefits effective the 1st of the month following their 26th year/birth month.**

DRV Delinquency Report

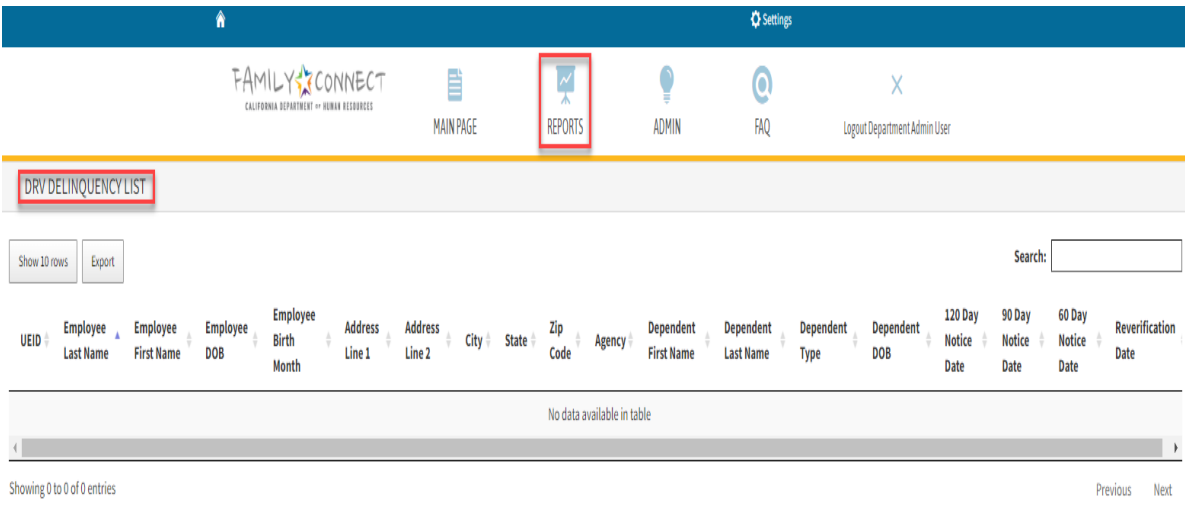
Review the DRV Delinquency Report.

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.

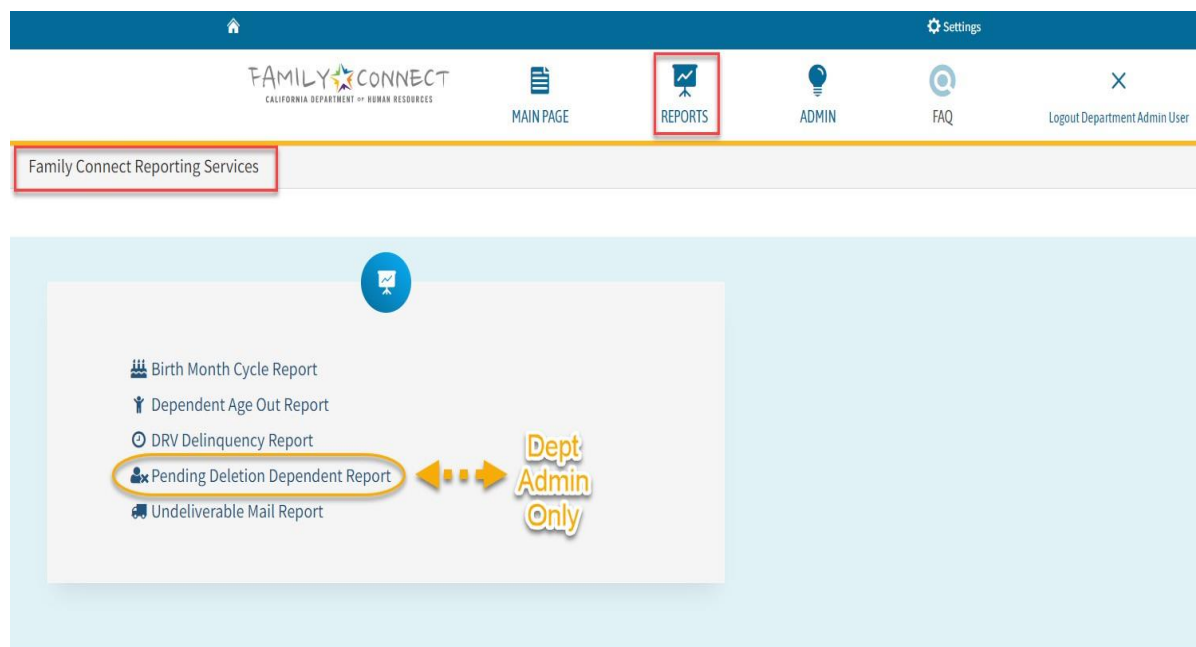
Pending Deletion Dependent Report (Dept Admin User only)

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.

PENDING DELETION LIST

Show 10 rows Export Search:

UEID	Employee Name	Dependent Name	Deletion Reason	Requested By
10000000000000000000000000000000	ACQUINTA, GEORGE A	Acquinta, Robert	Duplicate Dependent	User, Department
10000000000000000000000000000000	ACQUINTA, STEPHEN P	Acquinta, Michelle	Duplicate Dependent	User, Department
10000000000000000000000000000000	ACQUINTA, STEPHEN P	Acquinta, Steven	Incorrect First Name	User, Department
10000000000000000000000000000000	ACQUINTA, STEPHEN P	Tilly, Luke A	Incorrect Last Name	User, Department
10000000000000000000000000000000	ACQUINTA, STEPHEN P	Acquinta, Steven	Incorrect Date of Birth	User, Department
10000000000000000000000000000000	ACQUINTA, STEPHEN P	Acquinta, Steven	Duplicate Dependent	User, Department

Showing 1 to 6 of 6 entries

Step 3:

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



Dependent Name	Dependent Type	DOB	Re-verification End Date	Benefits	Exception	Needs Review	Deletion Status
Arms, Adam	Child	10/17/2008	10/31/2035	Dental	No	No	Pending Approval
Arms, Ryan	Child	10/15/2008	10/31/2030	Dental	No	No	
Arms, George, Andrew B	Child	7/20/2002	7/31/2047	Dental	No	No	

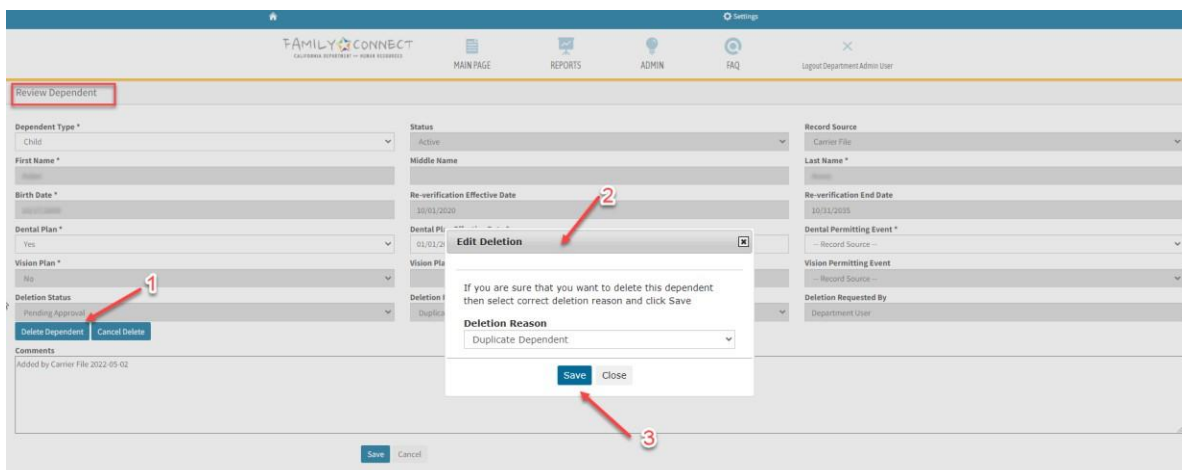
Showing 1 to 3 of 3 entries

Previous 1 Next

Save Cancel

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.



Review Dependent

Dependent Type * Child

First Name *

Birth Date *

Dental Plan * Yes

Vision Plan * No

Deletion Status Pending Approval

Delete Dependent Cancel Delete

Comments Added by Carrier File 2022-05-02

Status Active

Middle Name

Re-verification Effective Date 10/01/2020

Dental Plan 01/01/20

Deletion Reason Duplicate

Record Source Carrier File

Last Name *

Re-verification End Date 10/31/2035

Dental Permitting Event * -- Record Source --

Vision Permitting Event -- Record Source --

Deletion Requested By Department User

Edit Deletion

If you are sure that you want to delete this dependent then select correct deletion reason and click Save

Deletion Reason Duplicate Dependent

Save Close

Save Cancel

This completes the Pending Dependent Deletion Report overview scenario.

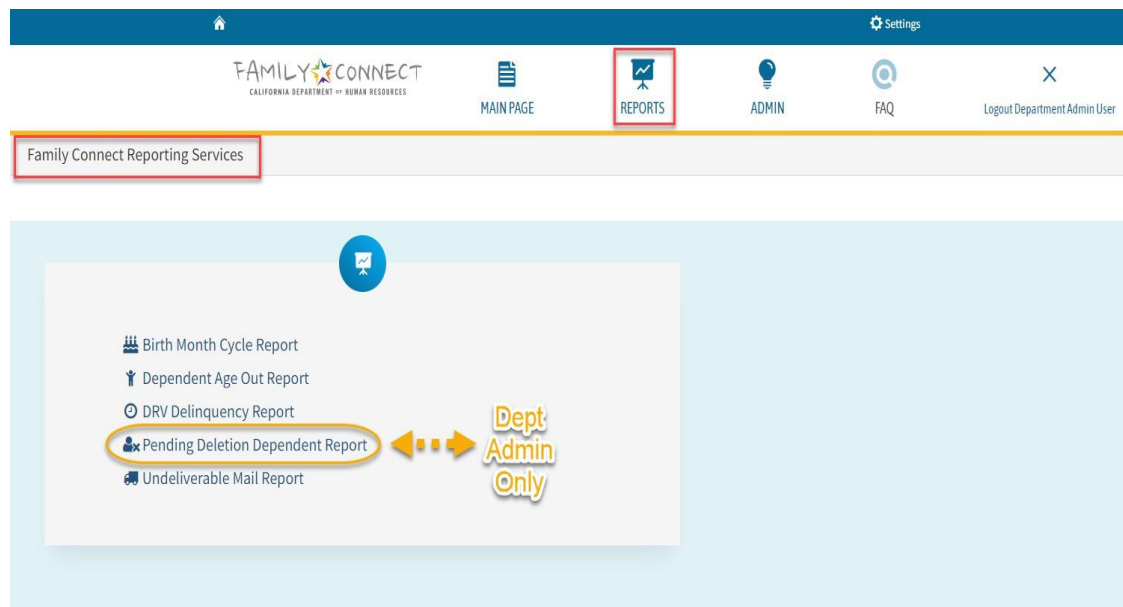
Undeliverable Mail Report

Review the Undeliverable Mail Report.

Step Actions

Step 1:

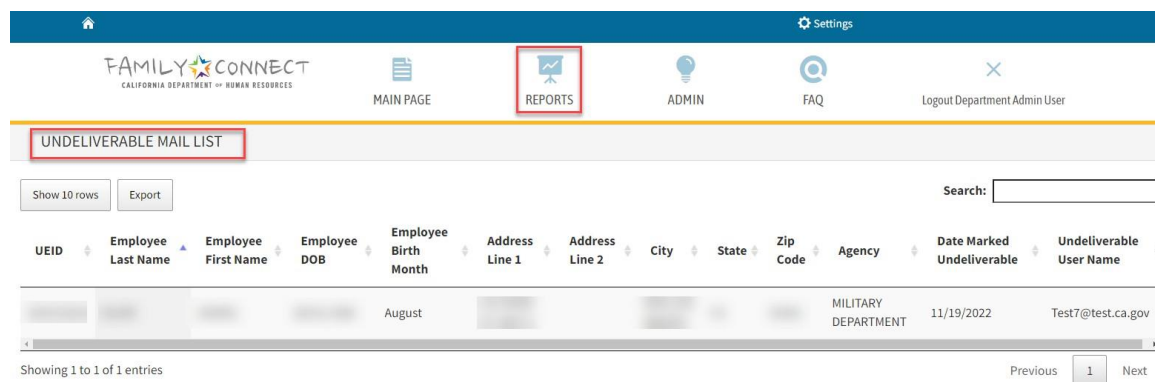
Click on the Reports Tab, and from the **Family Connect Reporting Services** page, select the Undeliverable Mail Report.



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.