Dependent Verification Review Checklist

Planning for the DVR

- [ ] **GET AGREEMENT**
  DVRs are most successful when all the people involved agree to participate. If employees are collectively bargained, involve employee representatives early on. Help explain the reasons for conducting the DVR and the potential benefits to employees. Consider allowing employees to voluntarily remove ineligible dependents before the DVR begins.

- [ ] **GATHER YOUR DOCUMENTS**
  Gather all the documents that define eligibility for your plan. This may include:
  - Information from your insurance carrier or third-party administrator
  - Plan documents
  - Summary plan description
  - Collective bargaining agreements
  - Personnel rules or other administrative regulations

- [ ] **EXAMINE YOUR DOCUMENTS**
  Do they all define eligibility the same way? If not, which definition will control the DVR?

- [ ] **DECIDE WHO WILL PERFORM THE DVR**
  Will you conduct it yourself or have a third-party step in to help?

- [ ] **INFORM STAKEHOLDERS OF THE TIMELINE**
  This typically includes your insurance carrier or third-party administrator, your staff, and your employees.

- [ ] **CREATE A COMMUNICATIONS PLAN**
  Keep your employees informed via email, meetings, newsletters, etc.

During the DVR

- [ ] **HOW WILL PRIVACY ISSUES BE ADDRESSED?**
  Be prepared to demonstrate this.

- [ ] **DESIGNATE A POINT PERSON**
  Who will troubleshoot any employee relations or other issues?

After the DVR

- [ ] **EXAMINE THE RESULTS**
  Discuss discrepancies between coverage and eligibility with your insurance carrier and decide what actions to take. Consult legal counsel as needed.

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