DEPENDENT ELIGIBILITY VERIFICATION

GETTING STARTED GUIDE

WWW.TASCONLINE.COM

Welcome

Welcome to TASC Dependent Eligibility Verification

Our Dependent Eligibility Verification service provides a way for you to ensure that all your employees' covered dependents are truly eligible to participate in your health benefit plan. These audits are a smart business practice for employers of all sizes, helping control unnecessary expenses, reduce liability, and serve to ensure compliance under federal laws such as ERISA, COBRA, and the Sarbanes-Oxley Act of 2002 (SOX) local and state laws. You as an employer have a responsibility to ensure that the health plan covers only those eligible under the plan. This audit helps show you are taking the necessary steps to ensure compliance.

This Guide will walk you through the Dependent Eligibility Verification process, what information TASC will need to start your audit, and what to expect during the course of your Dependent Eligibility Verification audit.

If you have questions, please email EligibilityAudit@tasconline.com or call our Dependent Eligibility Verification Specialists at 1-844-560-4642.

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Getting Started

During your TASC onboarding call, you will review the materials provided to you in your Dependent Eligibility Verification welcome letter. Following this onboarding call, there are several key things that you should do in order to ensure a successful Dependent Eligibility Verification audit:

1. **Ensure your eligibility provisions are accurately documented.** Your Summary Plan Description (SPD) and/or insurance certificate should outline the eligibility provisions for your plan. This is key in determining who is (and who is not) eligible. These eligibility provisions are typically established based on Federal (and in some cases State) requirements. These requirements can be included in your announcement letter to your employees that have a spouse or dependent(s) on your plan.

2. **Review the sample Employer Announcement Letter.** This sample letter serves as a template to create an employee notification that will help ensure the success of the Dependent Eligibility Verification process. We strongly recommend tailoring this letter to your specific needs and company culture to help your employees understand that they will be receiving a request from TASC soliciting information to prove eligibility and that they should respond promptly. This audit is not only beneficial to you, but also the employee. Should they have a dependent on the health plan who they believe is eligible (but is not), this process will save them from possible denial of coverage and/or disputed claim payments down the road.

3. **Complete your Census file.** TASC will need your Dependent Eligibility Verification Census file in order to start the mailing solicitation to those employees with dependent and/or spouse coverage. This information should be provided to TASC using the upload information provided during the onboarding call.

The Process

Once TASC has received your census file, we will contact you to see when you will be sending the announcement letter to your employees. This way TASC can ensure that our initial letter to the employees will go out ***after*** the release of that letter. This initial employee letter, and any subsequent employee reminder letters, will go out via US mail.

TASC will mail a second letter to any employee who has not responded to the first letter. This is usually 10 business days after the initial letter, but TASC will work with you on determining what that period should be.

Employees who do not respond to the second letter will be sent a third and final letter if they do not respond to the second letter.

Once the time frame has expired for this final letter, TASC will provide you a final report which will list each employee and their spouse and/or dependents who have been verified as either eligible or ineligible as well as those employees who have not responded or only partially responded to our requests.

Ongoing Audits
If you have selected TASC to conduct your ongoing Dependent Eligibility Verifications, you will submit on a monthly basis a list of those employees with dependents who newly enroll as well as current employees who have made a change entailing the addition of a spouse or dependent.

Spousal Verification (Optional)
If you have selected TASC to also conduct Spousal Verification as part of the Dependent Eligibility Verification process, at the time eligibility verification is solicited, TASC will also ask the employee to provide a letter from their spouse's employer (if applicable) as to whether or not the spouse is eligible for health coverage under the spouse's employer health plan.

TASC looks forward to conducting your Dependent Eligibility Verification. If you have any questions, please contact a Dependent Eligibility Verification Specialist at 844-560-4642 or eligibilityaudit@tasconline.com. Please have your 12-digit TASC ID available when contacting us.

Annual Service Renewal

Annual Service Renewal

At the end of the service period, you will automatically be re-enrolled for the upcoming service period.

TASC Invoicing Practices
TASC's invoicing practices aim to communicate expectations to all clients and providers, ensuring compliance to TASC services, creating consistency between all of TASC's divisions, and ensuring the continuation of services.

Philosophy
To ensure that TASC operations continue to run smoothly, various actions need to occur in a timely manner, including the payment of TASC administrative fees. Paying in advance demonstrates that the service is for the benefit of employees and provides further evidence that the service period has been established on a pre-thought basis. TASC invoices in advance for two additional reasons:

1. TASC requires a commitment in advance of the business being processed, and
2. TASC requires a payment history for its clients, so as to determine the clients' status of good standing.

Administrative Fees

Because your TASC service begins before the service period start date, TASC invoices on the anniversary of the service period start date. For example, for service periods with a January 1 start date, the first invoice is mailed on January 1 and is due upon receipt.

Types of Payments for Administrative Fees

- **Check:** Clients may pay by check.
- **E-Pay:** Clients may pay electronically as long as they use E-Pay, and as long as these fees are debited no later than seven (7) calendar days prior to the service period start date. Therefore, if a service period begins January 1, Clients will be debited on December 23.
- **ACH Credit:** Clients may pay administrative fees via an electronic ACH Credit transfer. A $40 per transaction Service Charge will be assessed and processed by TASC Premium Services. Clients should contact provider for details.
- **ACH Debit:** Clients may pay administrative fees via an electronic ACH Debit transfer. There is no Service Charge for this method.

Types of Invoices

- **Administrative Fee:** Generated annually for TASC services that are provided during the service period.
- **Premium Services Fee:** Generated when a client has elected a Premium Service.

Standard Invoicing Procedures

- **Invoice**: Generated and sent on your service period's anniversary of the service start date.
- **Due Date**: Due upon receipt.
- **Service Charge Date**: Your account will be placed on hold at 60 days, however there is not a service charge. If account remains unpaid at 104 days, your account may be canceled.
- **Statement**: A statement (second notice) of unpaid invoices will be mailed fifteen (15) calendar days prior to the start of the service period.
- **Past Due Email Notification:** On the first day of the service period or forty-five (45) calendar days after the original invoice date (whichever comes first), an email will be sent to any account with unpaid invoices older than forty (40) calendar days. This email will inform the client that the account will be put on hold.
- **Final Notice Statement:** A Final Notice Statement (third notice) will be mailed and if not paid by 104 days after the original invoice date, the account may be canceled.
- **Collections:** The account will be placed in collections forty-five (45) calendar days into the service period start, or ninety (90) calendar days after the original invoice date, whichever comes first.

Client Responsibilities

- **Please make your checks payable to TASC Administration**. Checks incorrectly payable to TASC Dependent Eligibility Verification can cause some confusion and may delay the administration of your service.
- Mail invoices and payments in the envelope provided to:
  TASC, 2302 International Lane, Madison, WI 53704-7098

  - All invoice payments must be submitted separately from all other payments and transactions.

  - All invoice payments must be made separately (i.e. one check with one invoice).
- Notify TASC of any disputes or any changes.

Confidentially Speaking

TASC®

A reporting program to ensure integrity in our workplace.

Our Confidentially Speaking reporting program guarantees enterprise employees, customers, vendors, and the public can safely and anonymously, without fear of retaliation, report a concern or communicate with management regarding sensitive information.

Why did we implement this program?

We recognize the need to provide this service not just for corporate governance, but to help us gain valuable feedback to alert leadership of inappropriate, unethical, or unlawful conduct that goes against our core values.

Everyone has an obligation to immediately report conduct inconsistent with our core values. No one will engage in, tolerate, or condone retaliatory behavior for using this program.

How does it work?

If you know or hear about unethical or unlawful activity, report the situation promptly to Confidentially Speaking via website or phone. Either method is 100% anonymous.

Possible categories of unacceptable activities and unethical behavior:

- Accounting, auditing, and financial concerns
- Conflict of interest
- Falsification of information
- Release of proprietary information
- Fraud, deceit, and embezzlement
- Securities violations
- Theft, safety concerns, company policy violations
- Discrimination and harassment
- Retaliation for reporting based on findings
- Unequal or differential treatment based on protected characteristics

How to Report

www.tasc.alertline.com

You'll be walked through each step and there is a place to upload supporting documents.

To receive follow-up information:

- Create a password, or
- Provide an email address (will remain anonymous)

877-874-8416

A trained representative will interview you. Once complete, you will receive a unique code related to your report allowing you to check case status and/or to follow up on the matter.

After reporting

Reported issues are fully investigated and escalated as necessary. The enterprise will take appropriate action against any person found to violate policy, or any applicable law. Any retaliation as a result of the report findings will not be tolerated.

Confidentially Speaking is administered by Navex Global, an independent organization contractually obligated to maintain confidentiality and not disclose personal information.