



Montgomery County Government
Office of Human Resources
101 Monroe Street, 7th floor
Rockville, MD 20850

Bolton

This announcement contains important information about your dependent coverage under your health plans administered by Montgomery County Government. Please read it carefully and respond by the deadline shown below so that your dependents do not lose coverage.

REFERENCE NUMBER:

June 17, 2021

DEADLINE: September 17, 2021

Update Regarding Dependent Recertification for Health Insurance Plans Revised Documentation Requirements & Extended Deadline: September 17, 2021

As communicated in March 2021, Montgomery County Government (MCG) is conducting a dependent recertification process for medical, prescription, dental and vision plans to ensure that each dependent is eligible for coverage. MCG has retained Bolton, an independent consulting firm, to conduct the dependent recertification process. You are receiving this notice because all or some of your covered dependents have not yet been recertified as of the date of this mailing. If you have already recertified your dependents, you do not need to follow the instructions in this packet.

Recently, changes have been made to the process and documentation requirements for plan members who have not yet recertified. Here are the changes:

- The deadline has been extended to September 17, 2021.
- Documentation is no longer required to recertify a biological or legally adopted child.* However, you still need to verify these dependents online or by using the enclosed Bolton Dependent Recertification Form.**
- Documentation is still required for spouses, grandfathered domestic partners, stepchildren and legal guardianship of a child. However, the documentation requirements have been modified for spouses, grandfathered domestic partners and legal guardianship of child. These changes are outlined in the enclosed Dependent Eligibility Matrix and FAQs. Please note, you still need to verify these dependents online or by using the enclosed Bolton Dependent Recertification Form.
- Disabled dependents and children covered by a Qualified Medical Child Support Order (QMSCO) will not appear on the enclosed Bolton Dependent Recertification Form. You are not required to verify these dependents online or by using the enclosed form.

** Bolton will perform a random audit of existing documentation for biological and legally adopted children by checking County records. If your dependent's information does not match the information that is in the County's system, you may be contacted and required to provide supporting documentation for those dependents by September 17, 2021.*

***Dependents turning age 26 during this audit are excluded from the audit and are not listed on the Dependent Recertification Form. Covered dependents who are also benefit-eligible MCG or participating agency employees are also excluded.*

To recertify your dependents online, follow these steps:

- Visit www.depconfirm.com/MCG and register your account using your reference number at the top of this letter.
- Once you are logged in, click "Get Started," review the information and make any necessary changes and click "Next."
- Select the appropriate dependent type from the drop-down menu and indicate if the dependent is eligible. If ineligible, enter the last date of eligibility. Then, click "Next."
- If required, upload documentation and click "Save." (Be sure to black out all financial information and Social Security numbers prior to uploading your documents.) If documentation is not required, simply click "Save." Please note: Your submission may reflect as "pending/missing information" for a few days until the system updates your status.

Note: Using the online system is subject to the terms of use and privacy policy of Hodges Mace, LLC, an Alight Company, the third-party host of the online platform.

If you do not have online access, you can use the enclosed Bolton Dependent Recertification Form and return to Bolton via one of these methods:

- Toll-free fax: 1-800-234-0112 using your *Fax Cover Sheet*, or
- Mail: Bolton, 36 S. Charles St., Suite 1000 Baltimore, MD 21201

After you have followed the steps above, you can check the status of your dependent recertification at any time by visiting www.depconfirm.com/MCG and selecting "Check Status – Overview." Please allow up to two weeks for your documents and/or portal steps to be processed.

- **In order to maintain your dependent's health plan coverage with no interruption, you must provide the required documents for all applicable dependents by September 17, 2021 or those dependent(s) will be removed from coverage. You will be notified 30 days in advance of the date that your dependent's coverage will be terminated.**
- If you need to order your documentation, please refer to the resources in the enclosed Dependent Eligibility Matrix. Represented employees who can demonstrate that they are unable to obtain the required documents through the resources outlined in the enclosed Dependent Eligibility Matrix must notify their respective union by or before Monday, August 16, 2021.

For more information, contact Bolton via email at MCG-mail@depconfirm.com or telephone at 1-866-419-0055 8:30 a.m. to 5:00 p.m. ET Monday through Friday.

The Office of Human Resources



OFFICE OF THE COUNTY EXECUTIVE

Marc Elrich
County Executive

Richard S. Madaleno
Chief Administrative Officer

Tuesday, May 18, 2021

Update on Dependent Recertification Project *Special Message from the Leaders of MCG, MCGEO, FOP, and IAFF*

Dear Employee and/or Retiree,

In an effort to manage healthcare costs and provide employees and retirees with the highest quality benefits, a recertification of all dependents enrolled in the bargained Montgomery County Government (MCG) health plans is being conducted to ensure that each dependent is eligible for coverage. Recertifying dependents is part of MCG's fiduciary responsibility to manage health insurance plans for the exclusive benefit of participants and their eligible dependents. The recertification is also designed to avoid future costs by ensuring only eligible dependents have access to the insurance plans. Dependent eligibility recertification audits are an industry best practice that ensures consistency of plan administration and enables the plan to operate for the exclusive benefit of employees, retirees, and their eligible dependents.

The County's current health and welfare consultant, Bolton Partners (Bolton), is conducting the dependent recertification. The County evaluated Bolton's security system to ensure that the data will be stored in a secure manner for the duration of the dependent recertification. The software utilized by Bolton has strict security controls in place and is regularly reviewed by an independent auditor for compliance. The audit includes a comprehensive review of the design and operating effectiveness of the system's rules and internal controls. The software's security is at a level that meets or exceeds the highest industry and regulatory standards. The Bolton system security protocols and independent audit certification documentation have been reviewed by The Department of Technology and Enterprise Business Solutions Security Office for compliance.

Documents that are provided via fax or mail will be maintained at Bolton's physical office in a locked room while documents transmitted electronically will be housed within Bolton's secure electronic platform. Upon completion of the dependent recertification, any physical copies of documents will be destroyed and any electronic files will be returned to the County in a secure fashion. Once the County receives the electronic data, Bolton will delete all electronic documents from their internal system and will be done in a manner that will not allow for recovery through the software recertification management system.

The deadlines that were initially communicated at the start of this project have been extended. **The new deadline for employees and retirees to recertify their dependents is Friday, September 17, 2021.**

All current County employees and retirees covered by a County healthcare plan will be provided with updated information regarding the recertification process and a list the documents required to recertify eligible dependents. Employees and retirees who have already submitted documentation to Bolton do

NOT need to resubmit. Any employees who experience difficulties obtaining required documents must notify their respective Union by or before Monday, August 16, 2021.

In the event that a dependent is deemed ineligible for insurance, employees will be provided notice of the determination via Certified U.S. mail and County email at least 30 calendar days prior to termination of benefits. Retirees will be notified by Certified U.S. mail at least 30 calendar days prior to termination of benefits.

Marc Elrich, County Executive, MCG
Richard S. Madaleno, Chief Administrative Officer, MCG
Gino Renne, President, MCGEO
Torrie Cooke, President, FOP
Jeffrey Buddle, President, IAFF



Dependent Recertification Form (Revised)

Bolton

Member Name: **John Tables**

Reference Number: **366-987654321**

Instructions

Deadline: September 17, 2021

Please visit www.depconfirm.com/MCG and register your account using your reference number at the top of this Form to verify your dependent types online. If you do not have online access, complete and return this form to Bolton by filling in the table below. Refer to the *Dependent Eligibility Matrix* for eligible dependent types. Note: You cannot add new dependents to your health plan through this recertification.

- Return this signed Dependent Recertification Form and all required supporting documents by **September 17, 2021**.
 - In Column A, all of your dependents enrolled in your healthcare plan administered by Montgomery County Government should be listed. The following dependents are excluded from the audit and are not listed on the Dependent Recertification Form: dependents turning age 26 during this recertification, dependents who are also MCG or participating agency benefit-eligible employees, disabled dependents and dependents covered by a QMCSO.
 - If a dependent is eligible, in Column B, fill in the appropriate Dependent # / Type from the first column of the *Dependent Eligibility Matrix* and check the box in Column C.
 - In Column D, please remove any dependents who are no longer eligible under the plan. If you check the box in Column D, fill in Column E for that row. This may determine whether this individual is eligible for COBRA continuation coverage.
- Sign and date the form at the bottom and return **only** this completed Form and supporting documentation for each eligible dependent to Bolton via **one** of the submission methods below:
 - Toll-free Fax: 1-800-234-0112 using your *Fax Cover Sheet*,
 - Online: www.depconfirm.com/MCG (register using your Reference Number at the top of this page), or
 - Mail: Bolton, 36 S. Charles St., Suite 1000 Baltimore, MD 21201

THIS IS NOT AN ENROLLMENT OPPORTUNITY; PLEASE DO NOT ADD NEW DEPENDENTS TO THE LIST BELOW.

A	B	C	D*	E
Dependent Name	Dependent Type (Insert # from Dependent Eligibility Matrix)	This dependent is eligible. I will provide the appropriate documents by the deadline	This dependent is NOT eligible. This dependent will be dropped from coverage. Provide last date of eligibility (if known) & complete Column E	Reason Dependent is NOT eligible (see Key below)
Suzy Tables		<input type="checkbox"/>	<input type="checkbox"/>	
Bobby Tables		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	

**Ineligible dependents will be removed from coverage(s) effective on the 1st day of the month following receipt of this form. You will receive a letter from Bolton confirming the change.*

Member Name: **John Tables**

Reference Number: **366-987654321**

Signature: _____

Date Signed: _____

I have submitted with this form **photocopies (not originals)** of documents required for each dependent listed on my health insurance plan. In the future, I will notify Montgomery County Government's Office of Human Resources staff if any of the above dependents no longer meet the definition for eligible dependents.

Opt-Out Reason Key: Divorce • Over Age Dependent • Never Eligible (i.e. Grandchild, Niece, etc.) • No Longer Eligible (i.e. Legal Guardianship, Stepchild, etc.) • Other (list explanation)



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Dependent Eligibility Matrix (Revised)

	Dependent Type	Eligibility Criteria	Documents/Steps Required for Recertification
1	Spouse/Domestic Partner	<ul style="list-style-type: none"> Your Legal Spouse. Domestic Partner only if established prior to June 28, 2016. A Domestic Partner established after June 28, 2016, a civil union partner, or ex-spouse is not an eligible dependent. 	<p>All of the following:</p> <ul style="list-style-type: none"> Verify your dependent online in Bolton's portal or return the completed Bolton Dependent Recertification Form Provide verification of marriage (a copy of certified marriage certificate, marriage license or a notarized statement of marriage♦ that includes the date of the marriage signed by both spouses) Submit one form of documentation dated within 6 months establishing current marital status such as joint household bill, joint bank/credit account, joint mortgage or lease, or front page and signature page of 2019 or 2020 jointly filed/married filing jointly or married filing separately Federal Tax Return or photocopy of spouse's current driver's license. All personally identifiable information should be redacted from such documents except the date and spouse's name and address. ♦ <i>See attached form.</i>
2	Biological Child*	<ul style="list-style-type: none"> Your Biological Child AND Up to age 26** 	<ul style="list-style-type: none"> Verify your dependent online in Bolton's portal or return the completed Bolton Dependent Recertification Form
3	Stepchild	<ul style="list-style-type: none"> Your Stepchild AND Up to age 26** 	<p>All of the following:</p> <ul style="list-style-type: none"> Verification of Spouse or Domestic Partner (see #1 spouse or domestic partner above) Verify your dependent online in Bolton's portal or return the completed Bolton Dependent Recertification Form Provide a copy of the child's birth certificate naming spouse as the child's parent
4	Legally Adopted Child*	<ul style="list-style-type: none"> Your Legally Adopted Child (legal adoption or in anticipation of a legal adoption) AND Up to age 26** 	<ul style="list-style-type: none"> Verify your dependent online in Bolton's portal or return the completed Bolton Dependent Recertification Form
5	Legal Guardianship of Child	<ul style="list-style-type: none"> You are the Legal Guardian in accordance with the laws of the state in which the dependent resides. AND Up to age 26** 	<p>All of the following:</p> <ul style="list-style-type: none"> Verify your dependent online in Bolton's portal or return the completed Bolton Dependent Recertification Form Provide a copy of court documents signed by a judge verifying legal custody of the child(ren) or a notarized statement attesting to legal guardianship of the child(ren)

OVER →

RESOURCES TO OBTAIN DOCUMENTS

Birth Certificates (United States)*

Maryland-issued Vital Records:
<https://health.maryland.gov/vsa/Pages/certs.aspx>

National Center for Health Statistics:
<http://www.cdc.gov/nchs/howto/w2w/w2welcom.htm>

National Database for Government Certified Vital Records:
<https://www.vitalchek.com>

Note: The most cost-effective option for obtaining document copies is directly from the local Health Department or Department of Vital Records where the birth/marriage took place. For example, if you were married in Frederick County Maryland, you can obtain your certified marriage certificate directly from Frederick County Circuit Court for \$5.50 (versus vitalchek.com for approximately \$24 plus shipping).
Given the current pandemic, continued delays are expected, and we advise you to plan accordingly.

Birth Certificates (International)*

U.S. Department of State:
<https://travel.state.gov/content/travel/en/records-and-authentications.html>
or
<https://travel.state.gov> and search "birth abroad"

Official Tax Return Receipt*

Internal Revenue Service:
<http://www.irs.gov/formspubs>

Bolton

Please direct all questions to Bolton via telephone or email; your call or email is confidential.

We can be reached toll-free at 1-866-419-0055 or mcg-mail@depconfirm.com

Representatives are available Monday through Friday, 8:30 a.m. - 5:00 p.m. (ET)

For more information, please visit <https://www.montgomerycountymd.gov/DepRecert>

**Bolton will perform a random audit of existing documentation for biological and legally adopted children by checking County records. If your dependent's information does not match the information that is in the County's system, you may be contacted and required to provide supporting documentation for those dependents by September 17, 2021. Examples of supporting documentation are birth certificate, adoption agreement, adoption decree, etc.*

***Qualified children are covered up to their 26th birthday. Dependents turning age 26 during this recertification are excluded from the recertification and are not listed on the Bolton Form. Covered dependents who are also benefit eligible MCG or participating agency employees are also excluded.*

+Represented employees who can demonstrate that they are unable to obtain the required documents through the above resources must notify their respective union by or before Monday, August 16, 2021.

**STATEMENT OF
MARRIAGE**

Use of this form is optional. Please refer to the *Dependent Eligibility Matrix*.

To continue receiving health insurance coverage for my covered dependents on Montgomery County's Group Insurance Programs, I certify that I, _____, was legally

married to _____ on the _____ day of _____
(Employee or Retiree Name) (Legal Spouse Name) (Day of Month)
_____, in the year _____, in the State of _____,
(Month) (Year) (State)

Signature of Employee or Retiree: _____ Date: _____
(Employee or Retiree Name) (Date Witnessed by Notary)

Signature of Legal Spouse: _____ Date: _____
(Legal Spouse Name) (Date Witnessed by Notary)

Employee/Retiree Bolton Reference Number*: _____

**Bolton Reference Number can be found at the top of the Bolton Announcement Letter.*

ACKNOWLEDGEMENT OF NOTARY PUBLIC

State of _____

County of _____

On this ____ day of _____, 20____, before me, the undersigned officer, personally appeared _____, known to me (or satisfactorily proven) to be the person or persons whose name(s) is/are subscribed to the within instrument and acknowledged that he/she/they executed the same for the purposes therein contained.

In witness whereof, I hereunto set my hand and official seal.

[Notary Seal] _____
[Name]
Notary Public

My Commission expires: _____

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REVISED FREQUENTLY ASKED QUESTIONS (FAQs) Dependent Recertification For Medical, Prescription, Dental and Vision Plans

1. Why is the recertification being conducted?

When ineligible individuals use the Montgomery County Government (MCG) health plans, health care costs increase for those who are eligible for coverage. This also results in a reduction of funds available for other benefit initiatives. MCG is conducting the recertification to make sure the plan enrollees are only paying for those who qualify for coverage.

2. Who must be recertified?

- Enrolled dependents of all active employees (including participating agencies).
- Enrolled dependents under age 65 of all retirees.

3. Who is conducting the recertification?

MCG has retained Bolton, an independent employee benefits consulting firm, to conduct the recertification.

4. Who are considered eligible dependents?

Please see the enclosed *Dependent Eligibility Matrix* insert for details of who is eligible for coverage under the plan. Note that the following dependents are excluded from the recertification and therefore are not listed on the Bolton Dependent Recertification Form.

- Dependents turning age 26 between March 1, 2021 and September 17, 2021
- Dependents who are also MCG or participating agency benefit-eligible employees
- Disabled Dependents over age 26 and Dependents covered under a QMCSO

5. What's the deadline for Bolton to receive the required documents?

The deadline to verify your dependent type is Friday, September 17, 2021. You can do this via Bolton's secure online portal or by returning the Bolton Dependent Recertification Form by mail and providing the required documentation outlined in the enclosed *Dependent Eligibility Matrix*.

6. How do I remove an ineligible dependent and then confirm the removal?

To remove an ineligible dependent, please complete the enclosed Bolton Dependent Recertification Form. You can submit the Form by visiting www.depconfirm.com/MCG (you will need to first register your account using the reference number at the top of the announcement letter) or by using the additional submission methods described in FAQ #8. Your ineligible dependent will be removed from coverage effective the **first day of the month following receipt of your completed Form**. You will receive a letter from Bolton confirming the change. You may check the status of your dependents by accessing your portal at www.depconfirm.com/MCG and navigating to "Check Status."

7. What types of documents can be submitted to recertify dependent coverage?

Please refer to the enclosed *Dependent Eligibility Matrix* insert. **Original documents should not be submitted as they will be scanned and then securely destroyed by Bolton.**

8. Can I give documentation to support my dependents' eligibility directly to MCG?

No. **All documentation must be submitted directly to Bolton (not MCG) either online or by fax or mail.** Failure to do so will delay the review of the dependent's eligibility and may result in a temporary lapse in coverage for the dependent. Submit your documentation via **one** of these methods:

- Toll-Free Fax: 1 (800) 234-0112 using your *Fax Cover Sheet*,
- Online: www.depconfirm.com/MCG (register using your Reference Number at the top of your letter), or
- Mail: Bolton, 36 S. Charles St., Suite 1000 Baltimore, MD 21201

CONTINUED...

9. I do not have copies of these documents – what should I do?

If you need to order your required documentation online, **please visit these resources as soon as possible as it can take up to 12 weeks to receive the documentation:**

- National Center for Health Statistics: <http://www.cdc.gov/nchs/howto/w2w/w2welcom.htm>
- National Database for Government Certified Vital Records: <https://www.vitalchek.com>
- Maryland Issued Vital Records: <https://health.maryland.gov/vsa/Pages/certs.aspx>
- Births outside of the United States: U.S. Department of State <https://travel.state.gov> (search “birth abroad”) or <https://travel.state.gov/content/travel/en/records-and-authentications.html>

The most cost-effective option for obtaining document copies is directly from the local Health Department or Department of Vital Records where the event took place. For example, if you were married in Frederick County Maryland, you can obtain your certified marriage certificate directly from Frederick County Circuit Court for \$5.50 (versus vitalchek.com for approximately \$24 plus shipping). **Given the current pandemic, continued delays are expected, and we advise you to plan accordingly.**

10. What will Bolton do with my documents? Will my personal information be safe with Bolton?

Yes, your personal information will be safe with Bolton. Please **do not send original documents** to Bolton, only photocopies. When Bolton receives your documents, they are stored in a secure cloud-based system with password-protected access. Bolton will ensure the confidentiality and privacy of all documents submitted during this process. After the recertification process is complete, Bolton will destroy all documents.

11. What will happen if I do not respond to Bolton’s request for documentation?

If you are unable or unwilling to provide the required documentation to recertify the dependent by September 17, 2021, you will be notified 30 days in advance of the date that your dependent’s coverage will be terminated. Expenses for any claims incurred after that date may not be covered and would be your responsibility.

12. Will my ineligible dependents be eligible for COBRA continuation coverage?

Only under very limited circumstances. If the dependent was never eligible for MCG health plan coverage, COBRA continuation coverage will not be available. If an eligible dependent has ceased to be eligible, the enrollee or dependent must submit a disenrollment form within 60 days of the date of the event that ended eligibility to qualify for COBRA.

13. My dependents are eligible; can I add or delete them now using the provided Bolton Dependent Recertification Form?

No, the dependent recertification process is not an opportunity to make benefit changes.

14. I provided copies of my dependent documents previously, can I obtain them from OHR Records Management?

No, OHR Records Management is unable to provide you with copies of your existing dependent documents. Please do not request copies from OHR Records Management.

15. Why is my dependent missing from the Bolton Dependent Recertification Form I received in the mail?

If your dependent is turning age 26 between March 1, 2021 and September 17, 2021; or your dependent is also a benefit-eligible MCG or participating agency employee; or your dependent is Disabled and over age 26; or your dependent is covered by a QMCSO then they do not need to be recertified and therefore are not reflected on the Bolton Dependent Recertification Form.

16. I am a bargaining unit member, and I am unable to order my required documentation. What should I do?

Represented employees who can demonstrate that they are unable to obtain the required documents through the resources provided in the *Dependent Eligibility Matrix* must notify their respective union by or before Monday, August 16, 2021.

Bolton

Please direct all questions to Bolton via telephone or email; your call or email is confidential.

Bolton can be reached toll-free at 1-866-419-0055 or mcg-mail@depcnfirm.com.

Representatives are available Monday through Friday, 8:30 a.m. - 5:00 p.m. (ET).

For more information, please visit <https://www.montgomerycountymd.gov/DepRecert>.



Bolton

DEPENDENT RECERTIFICATION FAX COVER SHEET

Toll-free Fax: 1-800-234-0112

YOUR NAME:

REFERENCE #:

PHONE NUMBER:

EMAIL ADDRESS:

NUMBER OF PAGES (including this cover sheet): _____

**Please use this cover sheet for each fax sent to Bolton. Always include your name, Reference Number, phone number and email address when faxing documents without this cover sheet. For additional questions, please login to the employee portal site using your Reference Number (noted above) or contact us via email or phone:*

Website: **www.depconfirm.com/MCG**

For security purposes, you will be required to register during your first log in.

Email: **MCG-mail@depconfirm.com**

Phone: **1-866-419-0055**

Our Phone Help Line is open from 8:30 a.m. to 5 p.m. ET, Monday through Friday.

**Bolton
36 S Charles St, Suite 1000
Baltimore, MD 21201**

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