

Dependent Verification Frequently Asked Questions

1. Why is my employer/Fund verifying dependent eligibility?

Your employer/Fund is conducting this audit to ensure that only eligible dependents are enrolled in the health plan. This helps control costs, maintain fairness for all participants, and comply with plan rules.

2. What happens if I do not complete the audit by the deadline?

If you do not complete the audit by the deadline, your dependent(s) may be removed from coverage. Once removed, reinstatement may be limited or require additional steps.

3. Why is my employer/Fund conducting the audit now?

Plan sponsors periodically conduct audits to confirm eligibility, especially as plan costs increase or after changes such as mergers, enrollment growth, or updated compliance requirements.

4. What kind of documentation will I need to verify my dependent(s)?

The required documents will vary based on the type of dependent(s) you cover, and the audit terms established by your employer/Fund. Common documents include marriage and/or birth certificates and your most recently filed tax return. You can find the document requirements specific to your employer/Funds' audit in the eligibility chart on the secure portal and/or in the communications you've received from PDA.

5. What if I don't have a copy of the necessary document(s)?

You can request copies from the appropriate agency. Some resources include:

Tax Returns

- If you use an accountant to file your annual tax return, they may be able to provide you with a copy of your 1040.
- If you use an online service such as TurboTax, you may be able to access your 1040 from your account on their website.
- A free transcript of a federal tax return can be obtained by contacting the local IRS office. Local contact information is available at <http://www.irs.gov>.

Marriage and/or Birth Certificates

- Contact the county or vital records office where the birth or marriage occurred.
- www.VitalChek.com – an online provider of vital records.
- U.S. Department of State – A Consular Report of Birth can be obtained by writing to the U.S. Department of State for individuals born abroad to U.S. citizen parents. Visit <http://www.state.gov> for more information.

Please contact PDA's Processing Center using the phone number provided in our communications to you if you need additional assistance with obtaining your documents. Please note that obtaining records can sometimes take longer than expected and requesting record copies may incur a fee. You should make document requests as soon as possible to avoid delays in responding to your organization's audit.

6. If I submit originals of my documents via mail, will I get them back?

No. Do not send original documents as they will not be returned.

7. What if the document states photocopying is prohibited?

You may still submit a copy for verification purposes. These notices typically apply to misuse or fraud, not legitimate verification audits. Please print the words "For Administrative Purposes" across the top of the first page of any document you have concerns about providing.

8. If I have some documents but not all, should I wait to submit them?

No. Submit what you have as soon as possible. This allows the verification process to begin and helps avoid delays.

9. If I submit documents by mail, how will I know if I've successfully verified my dependents?

If you submit your documents by mail, you will only be contacted by the PDA Verification Team if there is an issue with your submission. For status updates, you may call the PDA Verification Team 4 business days after mailing your documents to check the status of your account.

If you submit your documents via the web portal, you will receive an email message when your documents are reviewed and your status changes. You can then log in to see if your dependents are verified or if additional information is required.

10. What is the fastest way to complete the verification process?

The fastest method is to upload your documents through the secure online portal, which allows for quicker review and confirmation.

11. What type of files can be uploaded to the online portal?

PDA's portal can accept the following file types:

- PDF
- JPEG/JPG
- PNG
- GIF
- HEIC
- HEIF

File size limits may apply and will be noted in the portal.

12. Is the online portal mobile friendly?

Yes. The portal is mobile-friendly and can be accessed from a smartphone, tablet, or computer.

13. What browsers are supported?

The portal is compatible with most modern browsers. However, for the best experience, we recommend using Google Chrome to access the portal.

14. Who is Part D Advisors (PDA)? Why were they chosen?

Part D Advisors (PDA) is a trusted vendor specializing in eligibility audits and compliance services. They were selected for their experience, secure processes, and ability to manage audits efficiently while minimizing disruption for members.

15. Is the PDA process secure? How is my information protected?

Yes. PDA protects client data through a comprehensive, multi-layered IT security framework designed to meet and exceed industry standards. All critical data is securely housed in a SOC 2 certified third-party data center and supported by SOC 1 Type 2 audited business practices, ensuring strong controls and independent validation. PDA maintains strict HIPAA compliance through rigorous policies and mandatory annual employee training on handling sensitive information. Security is continuously reinforced through professional penetration testing, advanced malware defenses, and proactive patch management to address vulnerabilities. In addition, PDA implements robust backup procedures, detailed audit logging, and a formal business continuity plan to ensure data integrity, system reliability, and rapid recovery in the event of disruption. Together, these measures safeguard client data at every stage, providing a secure, compliant, and resilient environment.

16. Is this process confidential?

Yes. All information submitted is treated as confidential and used solely for verification purposes in accordance with privacy regulations. You can view a copy of PDA's Privacy Policy [here](#).

17. Can I redact financial information or Social Security Numbers?

Yes. You are encouraged to redact sensitive financial information and Social Security Numbers. PDA does not need this information to verify eligibility.

18. Can I remove an ineligible dependent during this process?

Yes. You can choose to remove a dependent if they are no longer eligible. Documentation may be required for removal.

19. Can I add a dependent during this process?

No. To add a dependent to your plan you will need to reach out to your organization directly for instructions.

20. My documents are not in English. Do I need a translation?

PDA is able to verify dependents using documents in English and Spanish. For any other language, we will require a translated copy.

21. I have more questions. Who do I contact?

For additional questions or concerns, please reach out to the PDA Verification Team directly using the phone number provided in our communications to you.