



Los Angeles Unified School District
DIVISION OF RISK MANAGEMENT & INSURANCE SERVICES
BENEFITS ADMINISTRATION
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Dear Retiree:

Enclosed are the domestic partner health benefit enrollment materials. This packet includes the following:

- Domestic Partner Health Benefits Information Sheet
The information sheet answers a variety of questions related to the available health benefit coverage and the enrollment process. In addition, questions 8-9 address the District's obligation to report the value of the domestic partner coverage as "income" for the retiree to the Internal Revenue Service.
- Declaration of Domestic Partnership - Retirees (Form HB9)
The LAUSD Declaration of Domestic Partnership form describes the eligibility criteria and the required documentation for domestic partner coverage. This form, ***which must be notarized***, requires you and your partner to attest to the fact that you meet all of the domestic partnership criteria and understand that the value of the coverage must be reported by the District to the Internal Revenue Service.
- LAUSD Request for Change of Dependent Status Form (Form HBR7)
This form is used to update the status of your dependent(s), including domestic partners. Please return it with the required documentation. Your domestic partner may be enrolled only in the same plans in which you are enrolled. If all of the required documentation is received by Benefits Administration by the 10th of the month, coverage will be effective the first of the following month.

Special Note: *If your domestic partner is Medicare eligible, you must send a copy of his/her Medicare card, which shows enrollment in Medicare Parts A and B, along with the other required documentation.*

If you have any questions, please call Benefits Administration at (213) 241-4262 or you may email your questions to benefits@lausd.net.

Please be advised that District personnel cannot offer tax or legal advice; therefore, you may wish to consult an attorney and/or tax advisor regarding the possible impacts of declaring a domestic partnership.

Sincerely,

Benefits Administration

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LAUSD Domestic Partner Health Benefit Information Sheet - Retirees

1. What benefit coverage is available to domestic partners?

An eligible domestic partner may be enrolled as a dependent in the retiree's medical, dental, and/or vision plans. Medical plan coverage includes mental health services and prescription drug benefits.

2. How do I enroll a domestic partner as a dependent?

You must submit a "Request for Change of Dependent Status" form, *notarized* "LAUSD Declaration of Domestic Partnership", and documentation establishing the relationship has existed for greater than 12 months from two of the four categories below:

- a. proof of common ownership/leasehold interest in real property;
- b. proof of common ownership of a motor vehicle;
- c. joint bank/credit account;
- d. designation as a beneficiary for life insurance or retirement benefits

If you and your Domestic Partner are registered with the State, in lieu of the documentation from two of the four categories, submit a copy of the certificate issued by the State.

Submit all required documents by email benefits@lausd.net, fax 213-241-4247, or mail to PO Box 513307, Los Angeles, CA 90051-1307.

3. Can the dependent child(ren) of a domestic partner be covered?

The dependent child(ren) may be covered only if the retiree has adopted the children or is their legal guardian. Please see your Annual Benefits and Enrollment Guide available at benefits.lausd.net, for additional information about the eligibility requirements for dependent child(ren) and the necessary documentation.

4. When is the domestic partner's coverage effective?

If all of the documentation is received by Benefits Administration by the 10th of the month, coverage will be effective the first of the following month.

5. What happens if the domestic partnership is dissolved? If the retiree dies?

If the domestic partnership is dissolved, coverage for the domestic partner will terminate the last day of the month in which the partnership ends. The retiree must notify Benefits Administration in writing within 30 days if there is a change in status and submit a "Request for Change of Dependent Status" form, which is available on the Benefits Administration website at benefits.lausd.net. If the retiree dies, the domestic partner must notify the Benefits Administration immediately. *Please note that your domestic partner is not eligible for the Federal health benefits continuation program (COBRA) or AB528 coverage.*

6. If I divorce or terminate my Domestic Partnership, when can I add another Domestic Partner?

If you divorce or terminate your Domestic Partnership you must wait at least twelve (12) months from when Benefits Administration is notified of the divorce or termination before you can add the same or another Domestic Partner.

7. Is the information submitted confidential?

The information and documentation provided is used solely for determining eligibility for health benefits as a domestic partner and will remain strictly confidential. In order to provide coverage, however, pertinent dependent information (e.g. name and Social Security number) will be provided to the various health plan providers and/or the LAUSD Accounting & Disbursements Division.

8. Is the value of the domestic partner coverage reported to the Internal Revenue Service?

Yes. The Internal Revenue Service treats the total value of the health coverage provided to domestic partners as “income” of the retiree and requires that it be reported. According to the IRS, the retiree is taxed on the fair value of the coverage provided. *The total value of the coverage will be submitted to the IRS on a W2 Form, and a copy will be sent to the retiree.*

9. How is the value of the domestic partner health benefit coverage determined?

In order to determine the value of the medical, dental, and vision coverage, the District uses the financial information provided by the health plans and determines the difference in cost for insuring one person versus two people. This difference is considered the fair value of the domestic partner coverage.

Note: While this approach has been used by other employers to determine the value of the coverage, the IRS has not issued regulations on how the value is determined; therefore, there is no guarantee that the IRS will agree with the amount of the taxable income reported. *Please consult your tax advisor and/or attorney regarding the implications of domestic partner coverage.*

10. What is the value of the coverage for 2023?

The charts below identify the monthly value of the coverage to keep your Domestic Partner enrolled for 2023 by health plan. This monthly value changes each calendar year based on the rates provided by the health plans.

MEDICAL PLANS

Age Range	Anthem Blue Cross Select HMO	Anthem Blue Cross EPO	Kaiser Permanente	Health Net HMO	Anthem Medicare Preferred (PPO) Plan
Under Age 65	\$997.52	\$1,617.99	\$929.32	\$1,281.73	\$1,617.99
Age 65 or over with Medicare Parts A & B	\$318.96	\$318.96	\$196.66	\$358.01	\$318.96
Age 65 or over with Medicare Part B Only	\$997.52	\$997.15	\$507.39	N/A	\$997.15

If your domestic partner is Medicare-eligible, you must provide us with a copy of his/her Medicare card that shows enrollment in Medicare Parts A and B.

DENTAL PLANS

Aetna Dental PPO	DeltaCare® USA DHMO	Western Dental (DHMO)	Western Dental (DHMO) Plus
\$ 65.11	\$ 13.26	\$ 11.13	\$ 12.78

VISION PLANS

VSP	EyeMed Vision Care
\$ 3.68	\$ 3.75

Note: The District does not provide tax or legal advice on the implications of adding domestic partner coverage. Individuals should review the implications of domestic partner coverage with their own legal and/or tax counsel.

LAUSD Declaration of Domestic Partnership – Retirees

I. Certification

Our domestic partnership began on _____

We, _____ SS# _____
Retiree (Last Name, First, M.I)

AND

_____ SS# _____
Domestic Partner (Last Name, First, M.I.)

certify that we are domestic partners in accordance with the following criteria and eligible for benefit coverage as domestic partners under the Los Angeles Unified School District Health Benefits Program.

Date: _____

II. Domestic Partner Eligibility Criteria

For the purposes of LAUSD Health Benefit coverage domestic partners means two adults of the same or opposite sex who have chosen to share their lives indefinitely in an exclusive and committed relationship to the same extent as married persons, reside together, and share a mutual obligation of support for the basic necessities of life.

Based on this definition, we declare and acknowledge that we meet **all** of the following criteria:

- A. Have shared a regular and permanent residence for the past 12 months immediately preceding the application for coverage with the LAUSD.
- B. Are jointly responsible to each other for basic living expenses; basic living expenses are defined as the expenses supporting daily living (i.e., shelter, food, clothing) and contributions need not be equal.
- C. Are not currently married to another person.
- D. Have not signed a declaration of a domestic partnership with the same or another individual in the previous 12 month period.
- E. Are at least 18 years of age.
- F. Are not blood relatives any closer than would prohibit a legal marriage in the state of residence.
- G. Are mentally competent to consent to a contract.
- H. Are financially interdependent as proven by at least two of the four categories listed below, (minimum 2 documents):
 - common ownership/leasehold interest in real property
 - common ownership of a motor vehicle
 - joint bank/credit account
 - designation as a beneficiary for life insurance or retirement benefits
- I. Have documentation showing the relationship has existed for greater than 12 months (This documentation may be one of the ones listed above or a third document).



III. Retiree Acknowledgments

- A. I agree to notify LAUSD Benefits Administration in writing within 30 days if there is a change in our status and submit a "Request for Change of Dependent Status" form.
- B. I understand that upon notification that the domestic partnership has ended, the coverage for the domestic partner will end the last day of the month in which the relationship terminates. Further, it is understood that the domestic partner is not eligible for the Federal health benefits continuation program (COBRA) or AB528.
- C. I understand that after such termination, a subsequent Declaration of Domestic Partnership cannot be filed until twelve months after the notification in writing of the termination has been filed with LAUSD Benefits Administration.
- D. I understand that I am responsible for the reimbursement of any expenses incurred as a result of any false or misleading statement contained in this Declaration of Domestic Partnership, including claims paid under any benefit plans in which I enroll my domestic partner.
- E. I understand that at present, the IRS considers the value of benefit coverage provided to a domestic partner as "income" to the retiree. I further understand that the value of the coverage will be reported to the IRS by the District.
- F. I understand that the District is not providing legal advice and that it may be advisable to consult an attorney or tax advisor regarding the possible legal implications of filing this Declaration of Domestic Partnership.
- G. I understand that this information will be kept confidential and has been requested solely for the purpose of determining eligibility and providing LAUSD Health Benefits.

IV. Declaration

- A. **Retiree:** I declare, under the penalty of perjury, that the forgoing is true and correct. Executed this day

_____ at _____
Date City/State

Print Name

Space Below for Use by Notary Public

Signature

Address

City/State/Zip

- B. **Domestic Partner:** I declare, under the penalty of perjury, that the foregoing is true and correct. Executed this day

_____ at _____
Date City/State

Print Name

Space Below for Use by Notary Public

Signature

Address

City/State/Zip





Los Angeles Unified School District
Benefits Administration

REQUEST FOR CHANGE OF DEPENDENT STATUS - RETIREES

Employee Number, Last Name, First Name, M.I., Social Security Number, Address, City, State, Zip Code, Phone Number, Email Address, Gender, Eff. Date, Process Date, Initial

HEALTH PLANS (Please check the plans you are currently enrolled.)

MEDICAL

Checkboxes for Anthem Blue Cross Select HMO, Anthem Blue Cross EPO, Anthem Medicare Preferred (PPO)*, Health Net HMO, Health Net Seniority Plus, No Medical Coverage, Kaiser Permanente HMO, Kaiser Senior Advantage

DENTAL

Checkboxes for Aetna Dental PPO, Western Dental DHMO Centers Only, DeltaCare USA DHMO, Western Dental DHMO Plan Plus, No Dental Coverage

VISION

Checkboxes for EyeMed Vision Care, VSP Vision Care, No Vision Coverage

DEPENDENT INFORMATION: Social Security number is mandatory for all dependents. (Attach additional pages if necessary)

Note: If you have a dependent between ages 19-25, please contact Benefits Administration for eligibility requirements

Table with columns: Action, SSN, Last Name, First Name, MI, Relationship, Date of Birth, Sex, Eff. Date. Includes checkboxes for Add/Delete and relationship types like Spouse, Domestic Partner.

Reason:

Date:

Form for Reason and Date with checkboxes for Add/Delete and relationship types like Son, Daughter, etc.

Reason:

Date:

MEDICARE INFORMATION (Mandatory if you and/or your spouse/domestic partner is age 65 or older)

Table with columns: Participant, Medicare Claim Number, Medicare A (Hospital) Effective Date, Medicare B (Medical) Effective Date. Row for Spouse / Domestic Partner.

* Retiree and/or their dependent must be enrolled in Medicare Parts A and B. If dependent is under 65 or Medicare eligible with Part B only, then the dependent will be enrolled in Anthem Blue Cross EPO.

NOTE: Coverage for eligible dependent(s) will begin effective the first day of the following month in which the form and required documentation are received. This application will not be accepted without documentation to verify dependent status.

SEE NEXT PAGE TO DETERMINE DOCUMENTS NEEDED

Social Security number is mandatory for all dependents. Newborn: Social Security # is required within 2 months.

Is your spouse/domestic partner a LAUSD employee? Yes No Employee #

THIS FORM WILL NOT BE PROCESSED UNLESS SIGNED AND DATED

I understand this election will remain in effect as long as I remain eligible, or until I make another election during an annual enrollment period. I hereby authorize any insurance company, organization, employer, hospital, physician, surgeon, or pharmacist to release any information requested to pay any claim under the plan selected.

Applicant's Signature, Date



Internal Use

Instructions

In order to assist the District in ensuring that your eligible dependents are properly enrolled under your District-sponsored plan, please read and follow the instructions below.

- **Complete this form, being sure to list all dependents you wish to enroll. If necessary, attach an additional sheet of paper to the form.**
 - a. List birthdays and Social Security numbers for all dependents. Social Security numbers are mandatory. Social Security numbers for newborns must be provided within two (2) months.
 - b. If your spouse/domestic partner is also a District employee/retiree, please list his or her employee number.
- **Provide verification of dependent status for dependents as follows:**
 - a. **Spouse** - attach a copy of your registered marriage certificate issued by the state. For new spouses, if a registered marriage certificate is received within 45 days of the marriage date, spouse will be covered effective the date of the marriage.
 - b. **Domestic Partner** - submit a notarized Declaration of Domestic Partnership form (available on <https://achieve.lausd.net/benefits/forms>) and submit the required documentation as outlined in Section II of the Declaration of Domestic Partnership form. If you and your Domestic Partner are registered with the State, in lieu of the documentation outlined in Section II, submit a copy of the certificate issued by the State. If all the required documentation is received by Benefits Administration by the 10th of the month, coverage will be effective the first of the following month.
 - c. **Natural children** - attach a copy of official birth certificate for each child. For newborns, if verification of birth is received within 30 days of birth (complimentary hospital birth certificate is acceptable), the newborn will be covered back to date of birth. If submitted more than 30 days but less than 5 months, the newborn will be covered on the first of the month after the verification was received. After a child is 5 months, an official birth certificate is required.
 - d. **Stepchildren** - for each child, attach a copy of the birth certificate and a copy of your registered marriage certificate (issued by the state), and a copy of your latest income tax return showing the child's dependent status.
 - e. **Guardianship/Adopted children** - attach a copy of the document verifying legal custody. If you submit verification of guardianship/adoption within 30 days of the guardianship/adoption, coverage will begin on the date of guardianship/adoption. If submitted more than 30 days, coverage will begin on the first of the month after the verification was received.
 - f. **Student Verification** - if your eligible dependent is age 19 but under age 25, you will also need to provide verification of his/her full-time (8 units) student status. Verification of enrollment must include: student's name, name of school, semester enrolled, and number of enrolled units. An official letter from the school verifying your child's full-time status is also acceptable.
 - g. **Legal Guardian** - if you are the legal guardian of a child, please attach a copy of the guardianship papers issued by the court.
 - h. **Disabled dependent** - must meet the disability standards of the plan and must be enrolled prior to age 19, or the dependent child must be enrolled as a full time student prior to the disabling condition.

Medicare requirement (Effective January 1, 2010):

1. If you and/or your dependent reach/are age 65 or older you must enroll and remain enrolled in Medicare Part B. If you do not enroll in Medicare Part B you will lose your health benefits until proof of enrollment is submitted.
2. If you and/or your dependent are eligible for Medicare Part A premium-free from the Centers of Medicare and Medicaid Services (CMS), you must enroll and remain enrolled in Medicare A.
3. If you are not eligible for Medicare Part A premium-free from CMS, you must verify ineligibility by providing LAUSD Benefits Administration with a confirmation letter from CMS. If you do not comply with Medicare A requirements, it will negatively impact your health coverage.
4. If you are a member of Kaiser, you must enroll in Senior Advantage (Kaiser's Medicare Advantage Plan) in order to maintain your coverage. If you are a member of Health Net HMO, you must enroll in Seniority Plus (Health Nets Medicare Advantage Plan) in order to maintain your coverage. All retirees in Anthem Medicare Preferred (PPO) Medical plan or Health Net Seniority Plus plan must have Medicare parts A and B.

DEPENDENTS FOR WHOM THE REQUIRED DOCUMENTATION IS NOT RECEIVED WILL NOT BE COVERED UNDER YOUR MEDICAL, DENTAL OR VISION PLAN(S) UNTIL THE APPROPRIATE DOCUMENTATION IS RECEIVED.

EFFECTIVE DATE OF ADDITIONS:

Coverage will begin on the first day of the month following the receipt of this form along with the required verification. **Example:** If verification and this form is received by Benefits Administration on January 1st, the dependent's enrollment becomes effective February 1st.

TERMINATION OF COVERAGE:

Coverage will be terminated on the last day of the month in which the retiree or the dependents become ineligible.

Complete and return this form (fax or email preferred) along with copies of the required documents to:

Fax: (213) 241-4247

Email: benefits@lausd.net

Los Angeles Unified School District - Benefits Administration

P.O. Box 513307

Los Angeles, CA 90051-1307

Phone: (213) 241-4262

Website: <http://benefits.lausd.net>