# Update Employee Information on a Regular Basis

Survey your employees each year to ensure the following information is up to date:

- Name.
- Address.
- Telephone number(s).
- Marital status (for benefits and tax withholding purposes).
- Number of dependents and dependent eligibility for benefit and tax withholding purposes.
- Beneficiary designations for insurance, disability, profit sharing, and 401(k) plans.
- Persons to be notified in case of emergency and contact information.

As part of your request for updated information, you can, like an increasing number of employers, ask employees to verify their marital status and the eligibility status of their dependents. Such a survey, otherwise known as a dependent eligibility audit, will help ensure that only those individuals who are eligible for your group health plan are on the plan. Proof of marital or dependent status can include: birth certificate, marriage license, court documents, and documentation that a dependent is a full-time student. Not only is such an audit helpful in improving accuracy and compliance, employers can also reap significant savings.

If an employer decides to conduct a dependent eligibility audit, maintaining good employee relations should be at top of mind when communicating the purpose and process of the survey. The employer's communication should include the fact that accurate records translate into better cost controls which could translate into potential lower premiums for all employees.

Another way to gather at least some of the information you need to update is to add a few columns to your next training attendance sheet. When employees arrive for training and sign the attendance sheet, you can also ask them to write down their primary and secondary phone numbers. Or you can pass out your employee information form at the end of the training session when you pass out the training evaluation sheet and ask employees to complete both documents.



In case of emergency, it is important for each organization to maintain up-to-date contact information for both employees and each employee's emergency contact. Updated information will help ensure that W-2s, COBRA notices, and other forms are received by your employees. In addition, if an emergency occurs, you will be able to reach an employee's emergency contact in a timely manner rather than finding out at an inopportune time that your information is outdated.

Consider developing a tickler system for updating licensures, registrations, and immigration status or documents showing eligibility to work in the United States (if permitted by law). Keep track of employees that fall into these categories and request proof up current standing according to your policy.

A few minutes spent now on gathering correct personal information for your employees will mean fewer headaches down the road when you need this information most.

**MRA's HR Hotline can help you!**

**866-HR-Hotline** | 866.474.6854

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