## Dependent Verification Requirements By Event Type

### By Dependent being Added

**Spouse** – defined as your legally married spouse. Includes same and opposite gender spouses.

<table>
<thead>
<tr>
<th>Event Type</th>
<th>New Hire</th>
<th>Open Enrollment</th>
<th>Life Event</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Spouse</strong></td>
<td>One of the following:</td>
<td>If newly married during calendar year, copy of marriage certificate. Otherwise, one of the following:</td>
<td>For Marriage, copy of Marriage certificate. For all other events where you are adding a spouse, one of the following:</td>
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<tr>
<td></td>
<td>• Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the spouse</td>
<td>• Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the spouse</td>
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<td>• Page 1 and certificate of electronic filing of most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the spouse</td>
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<td>OR</td>
<td>Marriage Certificate PLUS one of the following to show current joint tenancy:</td>
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<tr>
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<td>• Proof that employee and spouse are both listed on a lease or share the rent of a home (i.e. monthly bill)</td>
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<td>• Current billing statement for motor vehicle payment or other financial loan showing employee and spouse at the same address</td>
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<td>• Designation of the spouse as a primary beneficiary of the employee’s life insurance or retirement benefits and listing primary residence</td>
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<td>• Utility bill listing the employee and spouse for the same address, or two separate utility bills for the same location, one listing the employee and one listing the spouse</td>
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<td>• Utility bill listing the employee and spouse for the same address, or two separate utility bills for the same location, one listing the employee and one listing the spouse</td>
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<td>Dependent being Added</td>
<td>Event Type</td>
<td>Life Event</td>
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</tbody>
</table>
| Biological Child of Employee — under age 26 – defined as your biological child | New Hire | Dependent being Added
- Page 1 and signature page of employee’s *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- Page 1 and certificate of electronic filing of *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
  OR
  Birth Certificate
| New Hire | Open Enrollment
- Page 1 and signature page of employee’s *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- Page 1 and certificate of electronic filing of *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
  OR
  Birth Certificate
| For Birth - Copy of Birth Certificate. For all other events when adding a child or children for the first time, one of the following documents:
- Page 1 and signature page of employee’s *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- Page 1 and certificate of electronic filing of *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- OR
  Birth Certificate

| Adopted child under age 26 – defined as children you have legally adopted, or have been placed with you for adoption or in anticipation of legal adoption | New Hire | Dependent being Added
- Page 1 and signature page of employee’s *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- Page 1 and certificate of electronic filing of *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
  OR
  one of the following legal documents:
  - Court documents signed by a judge showing the employee has adopted the child
  - International adoption papers from country of adoption
  - Papers from the adoption agency showing intent to adopt
| New Hire | Open Enrollment
- Page 1 and signature page of employee’s *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- Page 1 and certificate of electronic filing of *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
  OR
  one of the following legal documents:
  - Court documents signed by a judge showing the employee has adopted the child
  - International adoption papers from country of adoption
  - Papers from the adoption agency showing intent to adopt
| For new Adoption, one of the following legal documents:
- Court documents signed by a judge showing the employee has adopted the child
- International adoption papers from country of adoption
- Papers from the adoption agency showing intent to adopt
For all other events where you are adding an adopted child:
- Page 1 and signature page of employee’s *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- Page 1 and certificate of electronic filing of *most recent* Federal Income Tax Return (1040, 1040A or 1040EX) *as filed with the IRS*, listing the child as dependent
- OR
  one of the following legal documents:
  - Court documents signed by a judge showing the employee has adopted the child
  - International adoption papers from country of adoption
  - Papers from the adoption agency showing intent to adopt
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<th>Annual Enrollment</th>
<th>Life Event</th>
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<tr>
<td>Foster Child under age 26 – defined as your foster child</td>
<td>New Hire</td>
<td>• Evidence of a legitimate foster child relationship, identifying the foster child by name and setting forth all relevant aspects of the relationship</td>
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<td>children or children placed with you for foster care</td>
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<td>Stepchild under the age of 26 – defined as your stepchild</td>
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<td>One of the following documents:</td>
<td>One of the following documents:</td>
<td>When adding a new stepchild due to marriage:</td>
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<td>(if child of same sex spouse, see below)</td>
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<td>• Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the stepchild as dependent</td>
<td>• Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the stepchild as dependent</td>
<td>• Marriage Certificate (indicating employee’s spouse is married to employee) AND Birth Certificate</td>
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<td>• Page 1 and certificate of electronic filing of most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the stepchild as dependent</td>
<td>• Page 1 and certificate of electronic filing of most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the stepchild as dependent</td>
<td>For all other events where you are adding a stepchild for the first time:</td>
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<td>• Marriage Certificate (indicating employee’s spouse is married to employee) AND Birth Certificate</td>
<td>• Marriage Certificate (indicating employee’s spouse is married to employee) AND Birth Certificate</td>
<td>• Page 1 and signature page of the employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the stepchild as dependent</td>
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| Child of Same Sex Spouse under the age of 26 – defined as child of same sex spouse | One of the following documents:  
  - Page 1 and signature page of same sex spouse’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Page 1 and certificate of electronic filing of same sex spouse’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Marriage Certificate (indicating employee’s spouse is married to employee)  
  - Birth Certificate AND  
  - Marriage Certificate (indicating employee’s spouse is married to employee) | One of the following documents:  
  - Page 1 and signature page of same sex spouse’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Page 1 and certificate of electronic filing of same sex spouse’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Marriage Certificate (indicating employee’s spouse is married to employee)  
  - Birth Certificate AND  
  - Marriage Certificate (indicating employee’s spouse is married to employee) | One of the following documents:  
  - Page 1 and signature page of same sex spouse’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Page 1 and certificate of electronic filing of same sex spouse’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Marriage Certificate (indicating employee’s spouse is married to employee)  
  - Birth Certificate AND  
  - Marriage Certificate (indicating employee’s spouse is married to employee) |
| Child under age 26 for whom the employee is court-appointed guardian – defined as a child for whom the employee has become the child’s court-ordered guardian or has been awarded legal and physical custody of the child, pursuant to a valid court order. | One of the following documents:  
  - Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Page 1 and certificate of electronic filing of most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Court documents signed by a judge verifying legal custody of the child | One of the following documents:  
  - Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Page 1 and certificate of electronic filing of most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Court documents signed by a judge verifying legal custody of the child | One of the following documents:  
  - Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Page 1 and certificate of electronic filing of most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
  - Court documents signed by a judge verifying legal custody of the child  
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When adding a child due to new court-ordered guardianship:  
- Court documents signed by a judge verifying legal custody of the child

When adding a child for whom the employee is court-appointed guardian for any other event:  
- Page 1 and signature page of employee’s most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
- Page 1 and certificate of electronic filing of most recent Federal Income Tax Return (1040, 1040A or 1040EX) as filed with the IRS, listing the child as dependent  
- Court documents signed by a judge verifying legal custody of the child
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<td>Child under age 26 for whom the Plan has reviewed a Qualified Medical Child Support Order (QMCSO) – defined as any recognized child(ren) you are required to cover under the Plan due to a Qualified Medical Child Support Order (QMCSO)</td>
<td></td>
<td>One of the following documents:</td>
<td>One of the following documents:</td>
<td>One of the following documents:</td>
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<td>• Court documents signed by a judge</td>
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<td></td>
<td></td>
<td>• Medical support orders issued by a State</td>
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<tr>
<td>Disabled Dependent – defined as your unmarried child who is physically or mentally incapacitated, to the extent that he/she is incapable of earning a living, and such handicap developed or began to develop before the dependent’s 26th birthday</td>
<td></td>
<td>One of the following documents:</td>
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<td>One of the following documents:</td>
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<td>• A copy of the completed Coverage Request for Incapacitated Dependent form signed by your physician. Form is located on the Plan’s website under Plans for Actives then click Important Forms.</td>
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<td>• Notice of Determination from the Social Security Administration</td>
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