

Dependent Verification Requirements By Event Type

	Event Type		
Dependent being Added	New Hire	Open Enrollment	Life Event
<p>Spouse – defined as your legally married spouse. Includes same and opposite gender spouses.</p>	<p>One of the following:</p> <ul style="list-style-type: none"> 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 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 <p style="text-align: center;">OR</p> <p>Marriage Certificate PLUS one of the following to show current joint tenancy:</p> <ul style="list-style-type: none"> Proof that employee and spouse are both listed on a lease or share the rent of a home (i.e. monthly bill) Current billing statement for motor vehicle payment or other financial loan showing employee and spouse at the same address Designation of the spouse as a primary beneficiary of the employee’s life insurance or retirement benefits and listing primary residence 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 	<p>If newly married during calendar year, copy of marriage certificate. Otherwise one of the following:</p> <ul style="list-style-type: none"> 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 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 <p style="text-align: center;">OR</p> <p>Marriage Certificate PLUS one of the following to show current joint tenancy:</p> <ul style="list-style-type: none"> Proof that employee and spouse are both listed on a lease or share the rent of a home (i.e. monthly bill) Current billing statement for motor vehicle payment or other financial loan showing employee and spouse at the same address Designation of the spouse as a primary beneficiary of the employee’s life insurance or retirement benefits and listing primary residence 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 	<p>For Marriage, copy of Marriage certificate. For all other events where you are adding a spouse, one of the following:</p> <ul style="list-style-type: none"> 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 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 <p style="text-align: center;">OR</p> <p>Marriage Certificate PLUS one of the following to show current joint tenancy:</p> <ul style="list-style-type: none"> Proof that employee and spouse are both listed on a lease or share the rent of a home (i.e. monthly bill) Current billing statement for motor vehicle payment or other financial loan showing employee and spouse at the same address Designation of the spouse as a primary beneficiary of the employee’s life insurance or retirement benefits and listing primary residence 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

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<p>Biological Child of Employee – under age 26 – defined as your biological child</p>	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 <p>OR Birth Certificate</p>	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 <p>OR Birth Certificate</p>	<p>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:</p> <ul style="list-style-type: none"> 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 <p>OR Birth Certificate</p>
<p>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</p>	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> ➤ 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 	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> ➤ 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 	<p>For new Adoption, one of the following legal documents:</p> <ul style="list-style-type: none"> 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 <p>For all other events where you are adding an adopted child:</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> ➤ 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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Foster Child under age 26 – defined as your foster children or children placed with you for foster care	<ul style="list-style-type: none"> Evidence of a legitimate foster child relationship, identifying the foster child by name and setting forth all relevant aspects of the relationship 	<ul style="list-style-type: none"> Evidence of a legitimate foster child relationship, identifying the foster child by name and setting forth all relevant aspects of the relationship 	<ul style="list-style-type: none"> Evidence of a legitimate foster child relationship, identifying the foster child by name and setting forth all relevant aspects of the relationship
Stepchild under the age of 26 – defined as your stepchild (if child of same sex spouse, see below)	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 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 <p>OR</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) <p>AND</p> <ul style="list-style-type: none"> Birth Certificate 	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 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 <p>OR</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) <p>AND</p> <ul style="list-style-type: none"> Birth Certificate 	<p>When adding a new stepchild due to marriage:</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) <p>AND</p> <ul style="list-style-type: none"> Birth Certificate <p>For all other events where you are adding a stepchild for the first time:</p> <ul style="list-style-type: none"> 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 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 <p>OR</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) <p>AND</p> <ul style="list-style-type: none"> Birth Certificate

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<p>Child of Same Sex Spouse under the age of 26 – defined as child of same sex spouse</p>	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 <p>AND</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) <p>OR</p> <ul style="list-style-type: none"> Birth Certificate <p>AND</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) 	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 <p>AND</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) <p>OR</p> <ul style="list-style-type: none"> Birth Certificate <p>AND</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) 	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 <p>AND</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee) <p>OR</p> <ul style="list-style-type: none"> Birth Certificate <p>AND</p> <ul style="list-style-type: none"> Marriage Certificate (indicating employee’s spouse is married to employee)
<p>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.</p>	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 <p>AND</p> <ul style="list-style-type: none"> Court documents signed by a judge verifying legal custody of the child 	<p>One of the following documents:</p> <ul style="list-style-type: none"> 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 <p>AND</p> <ul style="list-style-type: none"> Court documents signed by a judge verifying legal custody of the child 	<p>When adding a child due to new court-ordered guardianship:</p> <ul style="list-style-type: none"> Court documents signed by a judge verifying legal custody of the child <p>When adding a child for whom the employee is court-appointed guardian for any other event:</p> <ul style="list-style-type: none"> 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 <p>AND</p> <ul style="list-style-type: none"> Court documents signed by a judge verifying legal custody of the child

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<p>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)</p>	<p>One of the following documents:</p> <ul style="list-style-type: none"> • Court documents signed by a judge • Medical support orders issued by a State 	<p>One of the following documents:</p> <ul style="list-style-type: none"> • Court documents signed by a judge • Medical support orders issued by a State 	<p>One of the following documents:</p> <ul style="list-style-type: none"> • Court documents signed by a judge • Medical support orders issued by a State
<p>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</p>	<p>One of the following documents:</p> <ul style="list-style-type: none"> • 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. • Notice of Determination from the Social Security Administration 	<p>One of the following documents:</p> <ul style="list-style-type: none"> • 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. • Notice of Determination from the Social Security Administration 	<p>One of the following documents:</p> <ul style="list-style-type: none"> • 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. • Notice of Determination from the Social Security Administration