

Documentation Required for Verifying Dependent Eligibility

Below is a list of the documents required to verify the eligibility of dependents enrolling in the health plan.¹ In most cases, at least TWO forms of documents are required per dependent. Please read carefully, review the appropriate documentation, check the corresponding boxes, and sign and date at the bottom of the form. There is no need to keep copies of the supporting documentation. Retain this document with the district's copy of the application.

Employee Name: _____

DEPENDENT TYPE

Legal Spouse

Document Options for Verifying Eligibility (any one of the following document sets):

- ☐ Government-issued Marriage Certificate and Federal Tax Return within last 2 years listing spouse
- ☐ Government-issued Marriage Certificate and proof of joint ownership or residency issued within last 6 months
- ☐ Government-issued Marriage Certificate only (if married in the last 12 months)

Same-Sex Spouse

Document Options for Verifying Eligibility (any one of the following document sets):

- ☐ Same-sex government-issued Marriage Certificate and Federal Tax Return issued within last 2 years listing same-sex spouse
- ☐ Same-sex government-issued Marriage Certificate and proof of joint ownership issued within last 6 months
- ☐ Same-sex government-issued Marriage Certificate only (if married in the last 12 months)

Biological Child

Document Options for Verifying Eligibility (any one of the following documents):

- ☐ Government-issued Birth Certificate (including parents' names)
- ☐ Non-government-issued Birth Certificate (including child's name, date of birth and parents' names) if 3 months and under

Disabled Biological Adult Child¹

Documents for Verifying Eligibility:

- ☐ Government-issued Birth Certificate (including parents' names) and Federal Tax Return within last 2 years claiming child

Adopted Child

Document Options for Verifying Eligibility (any one of the following document sets):

- ☐ Adoption Placement Agreement (including child's birthdate) or Petition for Adoption (including child's birthdate)
- ☐ Adoption Certificate (including child's birthdate)

Disabled Adopted Adult Child¹

Documents for Verifying Eligibility:

- ☐ Adoption Certificate (including child's birthdate) and Federal Tax Return within last 2 years claiming child

Step-Child

Document Options for Verifying Eligibility (any one of the following document sets):

- ☐ Government-issued Birth Certificate (including parents' names), government-issued Marriage Certificate, and Federal Tax Return within last 2 years listing spouse
- ☐ Government-issued Birth Certificate (including parents' names) and government-issued Marriage Certificate (if married within last 12 months)
- ☐ Government-issued Birth Certificate (including parents' names), government-issued Marriage Certificate, and proof of joint ownership issued within last 6 months

Disabled Adult Step-Child¹

Documents for Verifying Eligibility:

- ☐ Government-issued Birth Certificate (including parents' names), government-issued Marriage Certificate, and Federal Tax Return within last 2 years listing spouse and claiming child

Legal Ward

Documents for Verifying Eligibility:

- ☐ Government-issued Birth Certificate and court-ordered document of legal custody

Disabled Adult Legal Ward¹

Documents for Verifying Eligibility:

- ☐ Government-issued Birth Certificate, court-ordered document of legal custody, and Federal Tax Return within last 2 years claiming child

Same-Sex Spouse Child

Document Options for Verifying Eligibility (any one of the following document sets):

- ☐ Government-issued Birth Certificate (including parents' names), same-sex government-issued Marriage Certificate, and Federal Tax Return within last 2 years listing spouse
- ☐ Government-issued Birth Certificate (including parents' names), same-sex government-issued Marriage Certificate, and proof of joint ownership issued within last 6 months
- ☐ Government-issued Birth Certificate (including parents' names) and same-sex government-issued Marriage Certificate (if married within last 12 months)

Same-Sex Spouse Adult Disabled Child¹

Document Options for Verifying Eligibility (any one of the following document sets):

- ☐ Government-issued Birth Certificate (including parents' names), same-sex government-issued Marriage Certificate, and Federal Tax Return within last 2 years listing spouse and claiming child
- ☐ Government-issued Birth Certificate (including parents' names), same-sex government-issued Marriage Certificate, proof of joint ownership issued within last 6 months, and Federal Tax Return within last 2 years listing spouse and claiming child
- ☐ Government-issued Birth Certificate (including parents' names) and same-sex government-issued Marriage Certificate only (if married within last 12 months)

Qualifying Event: _____

Names of Verified Dependents: _____

Effective Date of Coverage: _____

Group Administrator Signature²

Date

¹ The documents listed above to verify dependent eligibility are the preferred forms; however, in certain unique circumstances, financial dependency of an adult disabled child may not exist. In these situations, federal tax returns will not be required to verify the adult disabled child's financial dependency.

² Signature acknowledges that the employee provided the required documentation to verify the dependents listed on this form. Completion of this form does not guarantee enrollment in the Excellus plan. All enrollments in the plan are subject to Excellus approval.