

# DOCUMENTS REQUIRED FOR DEPENDENTS



In order to cover dependents under our plan, you must first ensure they meet the definition of an eligible dependent. If they do, you then must submit documents that can be used to verify them. Examples of eligible and ineligible dependents include the following:

## Eligible Dependents

- ▶ Your legal spouse; and
- ▶ Your domestic partner\*; and
- ▶ Your legal children who are under the age of 26, regardless of student status, marital status, financial dependence or residence; and
- ▶ Your children of any age who are mentally or physically disabled and dependent upon you for support; and
- ▶ Children who are covered by a Medical Child Support Order.

## Ineligible Dependents

- ▶ Your former spouse; and
- ▶ Your grandchildren; and
- ▶ Your fiancé; and
- ▶ Your grandparents, nieces, nephews and cousins; and
- ▶ Any other individuals who do not meet the definition of eligible dependents (above).

*The chart below identifies the documents you must submit to elect coverage for your dependents.*

\* Domestic Partners are eligible dependents for the Dental, Vision, Hospital Indemnity and Life Insurance Plans. Not the medical Plan.

REQUIRED DOCUMENTATION FOR SPOUSE/DOMESTIC PARTNER	
<p><b>Spouse</b> <u>One document must be provided</u> to verify a spouse</p>	<p style="text-align: center;"><b>ONE OF THE FOLLOWING:</b></p> <ul style="list-style-type: none"> <li>• Official state marriage certificate (certified and dated by the appropriate State or County official, such as the Clerk of Court) representing the court in the County or City in which the marriage took place; <b>OR</b></li> <li>• Church/justice of the peace marriage certificate; <b>OR</b></li> <li>• US military marriage certificate; <b>OR</b></li> <li>• Official foreign marriage certificate</li> </ul> <p style="text-align: center;"><b>OR THE FOLLOWING (if you are unable to submit a document from the list above):</b></p> <ul style="list-style-type: none"> <li>• Copy of most recent (2018) Federal Tax Return (Form 1040)* that shows the dependent listed as "Spouse" (copy of confirmation notice if filed online).</li> </ul>
<p><b>Domestic Partner</b> <u>Two documents must be provided</u> to verify a same or opposite sex domestic partner</p>	<ul style="list-style-type: none"> <li>• The <a href="#">Declaration of Domestic Partnership Affidavit</a></li> </ul> <p style="text-align: center;"><b>AND ONE OF THE FOLLOWING:</b></p> <ul style="list-style-type: none"> <li>• Common ownership of real property (joint deed or mortgage agreement) or a common leasehold interest in such property; <b>OR</b></li> <li>• Common ownership of a motor vehicle; <b>OR</b></li> <li>• Proof of a joint bank account or a joint credit account; <b>OR</b></li> <li>• Proof of designation as the primary beneficiary for life insurance or retirement benefits or under your partner's will; <b>OR</b></li> <li>• Assignment of a durable power of attorney or health care power of attorney; <b>OR</b></li> <li>• Municipal and/or state domestic partner registration or state marriage license, when applicable (if you reside in a municipality or state that provides such registration/licensure).</li> </ul>
REQUIRED DOCUMENTATION FOR CHILDREN	
<p><b>Natural Born Child</b></p>	<ul style="list-style-type: none"> <li>• Natural/Biological child's official State birth certificate (which must show the Bates employee as parent); <b>AND</b></li> <li>• "Required Documentation for Spouse" (see above) when the last name(s) of your dependent child(ren) do not match yours and you are not covering a spouse under your benefits.</li> </ul> <p><i>When the last name(s) of your dependent child(ren) do not match yours (as the result of getting remarried, for example), you must verify the tax dependency of the child(ren) to you by submitting a copy of your 2018 Federal Tax Return (Form 1040) that includes the child(ren) you are trying to cover. Or, if you do not claim the children as tax dependents, copies of your divorce and marriage documents must be provided.</i></p>

REQUIRED DOCUMENTATION FOR CHILDREN	
<b>Adopted Child</b>	<p><b>Pending adoption:</b></p> <ul style="list-style-type: none"> <li>• Notice of placement for adoption provided on adoption agency letterhead; <b>AND</b></li> <li>• Court order placing child pending final adoption.</li> </ul> <p><b>After adoption:</b></p> <ul style="list-style-type: none"> <li>• Final adoption decree signed by a judge <b>OR</b> a State-issued birth certificate (showing the employee as parent), <b>OR</b> state certificate of identification for child of foreign birth (showing the employee as parent); <b>AND</b></li> <li>• “Required Documentation for Spouse” (see above) when the last name(s) of your dependent child(ren) do not match yours and you are not covering a spouse under your benefits.</li> </ul>
<b>Stepchild</b> (must reside with the employee at least 50% of the time)	<ul style="list-style-type: none"> <li>• Child’s official State birth certificate (must indicate spouse as parent); <b>AND</b></li> <li>• “Required Documentation for Spouse” (see above) showing the names of the Bates employee and spouse; <b>AND</b></li> <li>• Applicable divorce decree or legal custody papers.</li> </ul> <p><b>Please note:</b> If no divorce decree or custody papers are available, you must attach – along with the marriage and birth certificates identified above - proof of the stepchild’s residence with the employee (e.g. school records, driver’s license, day care records, etc.).</p>
<b>Legal Ward/ Guardianship</b>	<p><b>EITHER:</b></p> <ol style="list-style-type: none"> <li>1. Court order signed by a judge or other court official confirming that the Bates employee has permanent legal custody of the child by a court order of custody or guardianship; <b>OR</b></li> <li>2. Will providing testamentary appointment, confirming that the employee has legal custody of the child.</li> </ol>
<b>Qualified Medical Child Support Order</b>	<p>Court order requiring the Bates employee to provide support and health coverage, signed by the child support officer or judge. This documentation is required when support is ordered for biological and adopted children and stepchildren. If you are submitting an order for the first time, it must have been issued within the past 60 days.</p>

## QUESTIONS

If you have any questions regarding this verification process, please contact Ken Emerson at 207-786-8271 or by email at kemerson@bates.edu