

Dependent Eligibility Matrix

Employees are required to substantiate their dependents before applying for benefits. The eligibility criteria outlined below is defined by dependent type for your reference. Employees must upload the appropriate document(s) in Oracle. UCHCN reserves the right to request original documents.

Tip: To easily verify dependent(s) download your IRS transcript at <https://www.irs.gov/individuals/get-transcript>

Dependent Type	Eligibility	Supporting Documents
Spouse	Married Spouse NOTE: A Federal Tax Return filed as "Head of Household" does NOT meet the eligibility guidelines. If presented to HR your Spouse will be considered ineligible to enroll as your dependent.	One of the following will be accepted: - Federal Tax Return (1040)¹ current filing period (preferred), or prior filing period - IRS Transcript current filing period (preferred), or prior filing period - If Married and filing separately; Employee is required to present both Federal Tax Returns. Each return must indicate "Married Filing Separately" status and include the name and SSN of the Spouse. - If newly Married, within the last 12 months you may present a Government Issued Marriage Certificate. - J-1 Visa Holder Residents ONLY, Marriage Certificate
Natural Birth Child Birth to Age 26 ²	Biological Child	One of the following will be accepted: - Federal Tax Return (1040) current filing period (preferred), or prior filing period - IRS Transcript current filing period (preferred), or prior filing period - Birth Certificate naming employee as child's biological parent - Qualified Medical Child Support Order (QMCSO)
Stepchild Birth to Age 26 ²	Child of current Spouse	One of the following will be accepted PLUS the Birth Certificate³: - Federal Tax Return (1040) current filing period (preferred), or prior filing period - IRS Transcript current filing period (preferred), or prior filing period NOTE: A birth certificate alone will <u>not</u> validate the stepchild's eligibility. Employee/Spouse relationship must also be substantiated.
Adopted Child Birth to Age 26 ²	Adopted Child Eligible at the time of placement	One of the following documents will be accepted: - Federal Tax Return (1040) current filing period (preferred), or prior filing period - IRS Transcript current filing period (preferred), or prior filing period - Court Documents naming Employee/Spouse as Guardian - Adoption Record - Qualified Medical Child Support Order (QMCSO)
Legal Guardianship/ Legal Custody Birth to Age 18	Child is under the protection or in the custody of the Employee/Spouse	One of the following documents will be accepted PLUS Court Documents naming Employee/Spouse as Legal Guardian/Custodian: - Federal Tax Return (1040) current filing period (preferred), or prior filing period - IRS Transcript current filing period (preferred), or prior filing period (not required if named as guardian in the last 12 months)
Permanently Disabled Adult Child⁴	Adult Dependent Child Overage 26	One of the following documents will be accepted AND Birth Certificate³ AND Physician documented incapacity of self-support letter OR Social Security Administration determination notice - Federal Tax Return (1040) current filing period (preferred), or prior filing period - IRS Transcript current filing period (preferred), or prior filing period

IMPORTANT: Please be prepared to show required documents for verification purposes, even if you have previously provided these documents to the Human Resources Department. For your information, official documents of birth, marriage and/or death certificates, from anywhere in the United States may be obtained through www.vitalchek.com or by calling (800) 255-2414, 5 AM – 5 PM PST. State document fees and courier fees will apply. **It is important to request required documents early to allow for processing time.**

- In accordance with IRS rules, filing Head of Household is considered a single status.
- Age 26 limit applies to Medical, Dental, Vision and Dependent Child Life Coverage.
- The birth certificate must include the employee's spouse's name as parent.
- Onset of disability must be prior to attaining age 26.
- We will accept an interim marriage certificate and birth announcement until the official document is available.