Diocese of San Jose

Benefits Department

Required Dependent Eligibility Verification

Eligible Dependents: Spouse (as defined by state law), and children under age 26

Dear DSJ Employee,
Reta Trust and The Diocese of San Jose work hard to preserve the benefits we offer to you and your dependents under our healthcare plan. In order to continue to do this, a**ll employees who enroll their dependents in the DSJ health plan will be required to provide documentation from list below in order for dependent's coverage to be approved.** The purpose of this requirement is to ensure that all dependents enrolled in the plan meet eligibility guidelines so that *only* eligible dependents are covered.

If you are plan to enroll your dependents on the DSJ Health Plan, **please be ready to provide copy of documents** during your online enrollment **or** within the allowable time in order for your dependents coverage to be approved.

Reta Trust Dependent Validation Approved Documents

Dependent Type	Approved Documents Requirement
Spouse	Marriage certificate **plus** one piece of documentation dated within the past 60 days to establish a common residence or financial interdependence – Examples of secondary documentation: • Jointly filed Form 1040 • Separately filed Form 1040 with the same address • Financial documents in both parties name • Utility bill in both parties name Do NOT accept medical bill with both parties name as secondary documentation
Child to age 26	Birth certificate listing the employee's name
Stepchild	Birth certificate naming spouse as the child's biological parent **and** applicable spousal documentation
Disabled Dependent	Birth certificate **and** a copy of the employee's recent Form 1040 claiming the individual as a dependent OR the dependent's Form 1040 filed from the employee's address OR SSDI documentation
Adoption/placed for adoption	Appropriate court document
Legal Guardianship / Foster Child	Court document establishing employee or the employee's spouse is the legal guardian

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