



Benefits Department

Dependent Eligibility Verification Requirements

Reta Trust and The Diocese of San Jose wish to preserve the benefits offered to you and your dependents under our healthcare plan. In order to do this, all employees electing to 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.

If you 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. Please keep in mind that once dependents coverage is approved, premiums will be charged retroactive to your benefits effective date.

Failure to submit correct documentation within the allowable time may result in your dependent(s) not receiving coverage.

Reta Trust Dependent Validation Approved Documents

Dependent Type	Approved Documents Requirement
Spouse	Marriage certificate <u>plus</u> one piece of documentation dated within the past 60 days to establish a common residence or financial interdependence – Examples of secondary documentation: <ul style="list-style-type: none"> • 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 <u>and</u> applicable spousal documentation
Disabled Dependent	Birth certificate <u>and</u> 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