

Dependent Eligibility Verification Matrix

Dependent Definition and Proof of Relationship	Required Documentation for Proof of Eligibility
<p>Legal Spouse</p> <p>A person who is legally married to an employee.</p> <p>This definition of spouse does not include a former spouse due to divorce. A former spouse does not qualify as a dependent.</p>	<p>One of the following:</p> <p>Marriage Certificate: Must contain</p> <ul style="list-style-type: none"> • Name of the employee • Name of the spouse • Date of marriage • Certifier's signature/official seal <p>OR</p> <p>Last 2 years of your U.S. tax return (first page only of Form 1040): Must contain</p> <ul style="list-style-type: none"> • Tax authority – Federal • Name of employee • Name of the spouse • Married filing jointly, or married filing separately • If married filing separately, spouse's name must appear on form <p>NOTE: <i>To maintain confidentiality, please black out financial information.</i></p> <p>OR</p> <p>J2 Visa</p>

If you have questions, call the OHR Contact Center at 612-624-8647 or 1-800-756-2363 Option 1 for Benefits, or by email at benefits@umn.edu. Please make a copy of this form for your records and return the original to Total Compensation by mail or fax.

Campus Mail:
Total Compensation
100 DonhoweB
Del Code 3122A

U.S. Mail:
Total Compensation
100 Donhowe Bldg.
319 15th Avenue SE
Minneapolis, MN 55455-0103

Fax: 612-626-0808
Phone: 612-624-8647
Email: benefits@umn.edu



Dependent Eligibility Verification Matrix (continued)

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<p>Child of the Employee or Spouse</p> <p>Includes any of the following, unmarried or married, under the age of 26:</p> <ul style="list-style-type: none"> • Biological child • Stepchild • Legally adopted child • Child legally placed for adoption • Child by legal guardianship • Foster child <p>If your spouse is not your covered dependent under the UPlan, and the dependent child is not legally or biologically your own, you must also provide required documentation of your marriage.</p> <p>Coverage may continue indefinitely beyond age 26 if the following applies:</p> <p>Your dependent child has a mental or physical disability and has been continuously covered. Coverage can continue as long as the dependent child remains disabled and is incapable of self-sustaining employment by reason of mental or physical disability, and is chiefly dependent upon the employee for his or her support and maintenance.</p>	<p>One of the following:</p> <p>Birth Certificate, Hospital Birth Record, Naturalization Certificate or Consular Report of Birth Abroad: Must contain</p> <ul style="list-style-type: none"> • Name of the employee or spouse • Name of the child • Date of birth <p>OR</p> <p>Last 2 years of your U.S. tax return (first page only of Form 1040): Must contain</p> <ul style="list-style-type: none"> • Tax authority – Federal • Name of employee or spouse • Name of the child <p>NOTE: <i>To maintain confidentiality, please black out financial information.</i></p> <p>OR</p> <p>J2 Visa</p> <p>OR</p> <p>Adoption Paperwork or Legal Guardianship Court Order: Must contain</p> <ul style="list-style-type: none"> • Name of the employee or spouse • Name of the child • Notary signature/indication document has been filed in court <p>OR</p> <p>Divorce Decree, Custody Agreement, or Qualified Medical Child Support Order (QMCSO): Must contain</p> <ul style="list-style-type: none"> • Name of the employee or spouse • Name of the child • Statement of responsibility for health coverage • Notary signature/indication document has been filed in court



Dependent Eligibility Verification Matrix (continued)

Dependent Definition and Proof of Relationship	Required Documentation for Proof of Eligibility
<p>Grandchild of the Employee or Spouse</p> <p>NOTE: Your unmarried grandchild is eligible for coverage if the grandchild is:</p> <ul style="list-style-type: none"> • your tax dependent; or • placed in your legal custody; or • legally adopted or placed with you for the purpose of adoption. <p>The grandchild must be dependent upon you for more than one-half of their support, and you must claim the grandchild as a dependent on your tax return. In these instances, the contributions made by the University, and your pre-tax contributions are not considered taxable income on your tax returns.</p> <p>Your unmarried grandchild is also eligible for coverage if the grandchild is:</p> <ul style="list-style-type: none"> • in your legal custody and dependent upon you for principal support and maintenance, but is a qualified tax dependent of another person, or • the dependent child of your unmarried dependent child, and even though the grandchild may be dependent upon you for principal support and maintenance, they would not be eligible to be your tax dependent under tax regulations. <p>In these instances, the contributions made by the University to your grandchild's coverage, as well as your contributions are considered taxable income on your tax returns.</p> <p>NOTE: You must also submit a copy of the birth certificate for your child who is the parent of your grandchild, except for adoption.</p>	<p>One of the following:</p> <p>Birth Certificate:</p> <p>Must contain</p> <ul style="list-style-type: none"> • Name of the child of the employee or spouse • Name of the grandchild • Date of birth <p>OR</p> <p>Legal Guardianship Court Order:</p> <p>Must contain</p> <ul style="list-style-type: none"> • Name of the child of the employee or spouse • Name of the grandchild • Notary signature/indication document has been filed in court <p>AND For All Of The Above, You Must Also Submit:</p> <p>Last 2 years of your U.S. tax return (first page only of Form 1040):</p> <p>Must contain</p> <ul style="list-style-type: none"> • Tax authority – Federal • Name of the grandchild of employee or spouse <p>NOTE: To maintain confidentiality, please black out financial information.</p> <p>OR</p> <p>Adoption Paperwork:</p> <p>Must contain</p> <ul style="list-style-type: none"> • Name of the child of the employee or spouse • Name of the grandchild • Notary signature/indication document has been filed in court