

## DEPENDENT DEFINITIONS AND DOCUMENTS REQUIRED

### THINGS TO REMEMBER:

- Only submit copies. Original documents will not be returned
- Parent names and dates of birth or date of marriage must be visible on birth and marriage certificates
- If submitting a 1040 Federal Tax Return, send the first page **AND** signed signature page
- **Black out social security number(s)** appearing on any documents submitted
- Joint ownership documents must be submitted with your government issued marriage certificate and must show a **date of issue in the last 6 months**. Some examples of documents proving joint ownership are:
  - Mortgage statements
  - Bank statements
  - Credit Card statements
  - Utility bills
  - Active rental or lease agreements
  - Home equity loan statement
  - Automobile registration
- **Black out all monetary amounts and account number**

Definition of Dependent	Documentation Required
<p><b>Spouse</b></p> <ul style="list-style-type: none"> <li>• Must be your lawfully married spouse</li> <li>• Must not be legally separated</li> </ul>	<p>Submit documents from Group A <u>or</u> Group B.</p> <p><b>Group A</b></p> <ul style="list-style-type: none"> <li>• Page 1 <b>and</b> signed signature page of your Federal TaxReturn filed in the last 2 years</li> </ul> <p><b>OR</b></p> <p><b>Group B</b></p> <ul style="list-style-type: none"> <li>• Government issued marriage certificate; <b>AND</b></li> <li>• Proof of joint ownership with an <b>issue date in the past 6 months</b> (see "Things to Remember" above for a list of joint ownership options)</li> </ul> <p>Note: If you were married within the past 12 months, you may submit only your government issued marriage certificate.</p>
<p><b>Registered Domestic Partner</b></p> <ul style="list-style-type: none"> <li>• Must be in a Domestic Partnership registered with a government entity</li> </ul>	<p>Submit documents from Group A <u>or</u> Group B.</p> <p><b>Group A</b></p> <ul style="list-style-type: none"> <li>• Page 1 <b>and</b> signed signature page of your State TaxReturn filed in the last 2 years</li> </ul> <p><b>OR</b></p> <p><b>Group B</b></p> <ul style="list-style-type: none"> <li>• State or County Declaration of Domestic Partnership; <b>AND</b></li> <li>• Proof of joint ownership with an <b>issue date in the past6 months</b> (see "Things to Remember" above for a list of joint ownership options)</li> </ul>

<p><b>Unregistered Domestic Partner</b></p> <ul style="list-style-type: none"> <li>• Must be each other's sole domestic partner in a long-term committed relationship and intend to remain so indefinitely</li> <li>• Must not be legally married nor in another domestic partnership</li> <li>• Must not be related to each other</li> <li>• Must be at least 18 years of age and able to consent to the relationship</li> <li>• Must be financially interdependent</li> <li>• Must share a common residence</li> </ul>	<p>Submit documents from Group A.</p> <p><b>Group A</b></p> <ul style="list-style-type: none"> <li>• Unregistered Domestic Partner Affidavit for UC Health &amp; Welfare Benefits Plans; <b>AND</b></li> <li>• Proof of joint ownership with an issue date in the past 6 months</li> </ul> <p>Note: The Unregistered Domestic Partner Affidavit can be found on:</p> <ul style="list-style-type: none"> <li>• UnifyHR site under Resources: <a href="http://app.unifyhr.com">app.unifyhr.com</a></li> <li>• UCNet: <a href="http://ucal.us/fmv">ucal.us/fmv</a></li> </ul>
<p><b>Child under the age of 26</b></p> <ul style="list-style-type: none"> <li>• Natural child <ul style="list-style-type: none"> <li>◦ Must be your natural child</li> </ul> </li> <li>• Adopted child <ul style="list-style-type: none"> <li>◦ Must be your adopted child</li> </ul> </li> <li>• Step child <ul style="list-style-type: none"> <li>◦ Must be your spouse or partner's natural, adopted, or foster child</li> </ul> </li> <li>• Foster Child <ul style="list-style-type: none"> <li>◦ Must be your foster child</li> </ul> </li> <li>• Grandchild <ul style="list-style-type: none"> <li>◦ Must be your or your spouse or partner's natural, adopted, or step grandchild</li> <li>◦ Must be unmarried</li> <li>◦ Must be living with you and dependent upon your for support</li> <li>◦ Must be claimed as a tax dependent</li> </ul> </li> </ul>	<p>Submit documents as determined by your family member(s)' relationship type below.</p> <p><b>Natural or Adopted Child</b></p> <ul style="list-style-type: none"> <li>• Government issued birth certificate listing parent names; <b>OR</b></li> <li>• Non-government issued birth certificate for children under 6 months of age: <b>OR</b></li> <li>• Adoption certificate; <b>OR</b></li> <li>• Adoption placement agreement</li> </ul> <p><b>Step Child</b></p> <ul style="list-style-type: none"> <li>• For step children, your spouse or partner must be eligible for the UC Health &amp; Welfare benefits even if they are not enrolled. Provide the required documents listed in the appropriate family member category to verify spouse or partner.</li> <li>• <b>In addition you must submit one of the following:</b></li> <li>• Government issued birth certificate listing spouse or partner name as parent; <b>OR</b></li> <li>• Adoption Certificate listing spouse or partner name as parent</li> </ul> <p><b>Foster Child</b></p> <ul style="list-style-type: none"> <li>• Foster care letter of placement</li> </ul> <p><b>Grandchild</b></p> <ul style="list-style-type: none"> <li>• For step grandchildren, your spouse or partner must be eligible for the UC Health &amp; Welfare benefits even if they are not enrolled. Provide the required documents listed in the appropriate family member category to verify spouse or partner.</li> <li>• <b>In addition you must submit the following:</b></li> <li>• Government issued birth certificate or adoption certificate listing parent names for grandchild; <b>AND</b></li> <li>• Government issued birth certificate or adoption certificate listing parent name for child; <b>AND</b></li> <li>• Federal Tax Return filed in the last 2 years claiming child</li> </ul>

<p><b>Child under the age of 18</b></p> <ul style="list-style-type: none"> <li>• Legal Ward <ul style="list-style-type: none"> <li>◦ Must be unmarried</li> <li>◦ Must be living with you and dependent upon your for support</li> <li>◦ Must be claimed as a tax dependent</li> <li>◦ Must be your court ordered legal ward</li> </ul> </li> </ul>	<p><b>Legal Ward</b></p> <ul style="list-style-type: none"> <li>• Court ordered document granting guardianship; <b>AND</b></li> <li>• Federal Tax Return filed in the last 2 years claiming child</li> </ul>
<p><b>Child aged 26 or older</b></p> <ul style="list-style-type: none"> <li>• Natural, Adopted, Step Child, and Grandchild or Step Grandchild <ul style="list-style-type: none"> <li>◦ Must be a child as defined above</li> <li>◦ Must be unmarried</li> <li>◦ Must be incapable of self-support due to a mental or physical disability</li> <li>◦ Must be dependent upon you for support</li> <li>◦ Must be claimed as a tax dependent</li> </ul> </li> </ul>	<p><b>Natural, Adopted, Step Child, and Grandchild or Step Grandchild</b></p> <ul style="list-style-type: none"> <li>• Provide the required documents listed previously in the appropriate family member category above, as proof that the child is your or your spouse's or partner's natural or adopted child, your step child, grandchild, or step grandchild; <b>AND</b></li> <li>• Federal Tax Return filed in the last 2 years claiming child; <b>AND</b></li> <li>• Affidavit of Disability</li> </ul> <p>Note: The Affidavit of Disability can be found on:</p> <ul style="list-style-type: none"> <li>• UnifyHR site under Resources: <a href="http://app.unifyhr.com">app.unifyhr.com</a></li> <li>• UCalNet: <a href="http://ucal.us/fmv">ucal.us/fmv</a></li> </ul>