

# Qualifying Life Event Required Supporting Documentation

## QUICK REFERENCE GUIDE



Change Reason/Life Event Type	Required Documentation	SHARED04
<b>Employee: Birth/Adoption</b> <b>Retiree: Birth/Adoption</b>	<p><b>Biological Child:</b></p> <ul style="list-style-type: none"> <li>Copy of child's official state birth certificate with name of employee listed as child's parent.</li> <li>** Official birth certificate required within 60 days</li> </ul> <p><b>Adopted Child:</b></p> <p><b>Pending Adoption:</b></p> <ul style="list-style-type: none"> <li>Notice of placement for adoption on adoption agency letterhead or copy of court order placing child pending final adoption.</li> </ul> <p><b>Final Adoption:</b></p> <ul style="list-style-type: none"> <li>Copy of final adoption decree signed by a judge or a state-issued birth certificate showing employee as parent</li> </ul> <p><b>Stepchild:</b></p> <ul style="list-style-type: none"> <li>Copy of child's official birth certificate with name of spouse of employee listed as child's parent</li> <li>Copy of employee's official marriage certificate signed by Clerk of the Court, Registrar, etc</li> </ul>	
<b>Employee: Change in Dependent Daycare</b>	<p><b>To Reduce the Annual Amount:</b></p> <ul style="list-style-type: none"> <li>Letter from the daycare provider on letterhead indicating a reduction in rate or a reduction in hours with the effective date of the change.</li> </ul> <p><b>To Increase the Annual Amount:</b></p> <ul style="list-style-type: none"> <li>Letter from the daycare provider on letterhead indicating an increase in rate or an increase in hours with the effective date of the change.</li> </ul> <p><b>To Cancel:</b></p> <ul style="list-style-type: none"> <li>Letter from the daycare provider on letterhead indicating the last day the dependent attended the daycare.</li> </ul>	
<b>Employee: Child Support Order</b> <b>Retiree: Child Support Order</b>	Copy of child support order	
<b>Employee: Death of Dependent</b> <b>Retiree: Death of Dependent</b>	Death certificate	

Change Reason/Life Event Type	Required Documentation
<b>Employee: Dependent Arriving in US</b> <b>Retiree: Dependent Arriving in US</b>	<p>In addition to the documentation required to show proof of relationship, a copy of the passport with the arrival date indicated or a copy of I-94, along with proof of residence in USA.</p> <p><b>For children:</b></p> <ul style="list-style-type: none"> <li>One of the following – letter from school, daycare provider or pediatrician on letterhead indicating address on file, driver's license/identification card, or lease agreement.</li> </ul> <p><b>For spouse:</b></p> <ul style="list-style-type: none"> <li>One of the following – driver's license/identification card, mortgage/lease agreement, letter from employer on letterhead indicating address on file.</li> </ul>
<b>Employee: Dependent Leaving US</b> <b>Retiree: Dependent Leaving US</b>	<p>Copy of travel itinerary and one of the following to support a change in residence outside of the USA:</p> <ul style="list-style-type: none"> <li>Copy of Lease agreement or mortgage.</li> <li>Letter from employer on letterhead indicating permanent address on file.</li> <li>For children - letter from school/daycare on letterhead indicating permanent address on file.</li> </ul>
<b>Employee: Divorce</b> <b>Retiree: Divorce</b>	<p>Divorce decree</p>
<b>Employee: Gains Coverage Elsewhere</b> <b>Retiree: Gains Coverage Elsewhere</b>	<p>Letter from other employer (on company letterhead) or the insurance provider. The letter must list the names of your covered dependents and the effective date of the new coverage.</p>
<b>Employee: Legal Guardianship</b> <b>Retiree: Legal Guardianship</b>	<p>Copy of Legal Ward/Testamentary court document, signed by a judge and proof of legal residency.</p>
<b>Employee: Loses Coverage Elsewhere</b> <b>Retiree: Loses Coverage Elsewhere</b>	<p>Letter from previous employer (on company letterhead) or the insurance provider. The letter must list the names of your covered dependents*, the effective date of the loss of coverage, and reason for the loss.</p> <p>*Proof of relationship: certified marriage certificate and/or certified birth certificate</p>
<b>Employee: Marriage</b> <b>Retiree: Marriage</b>	<p>Official State marriage certificate (must be a certified copy and dated by the appropriate State or County official after the date of marriage, such as the Clerk of Court).</p>