



# The Portland School District No. 1 Health and Welfare Trust

## Eligibility Definitions and Required Documents

Documentation to verify eligibility must be provided for all dependents identified on the *Verification Form* as being eligible for coverage under the Trust.

### DEFINITIONS OF ELIGIBLE DEPENDENTS

- Spouse** Your current legal spouse as recognized by law. A legally separated or divorced ex-spouse is **NOT** an eligible dependent, even if a divorce decree mandates that you insure your ex-spouse.
- Domestic Partner** Your current legal domestic partner.
- Child Up To Age 26** Your or your domestic partner's biological child; a legally adopted child or a child placed with you in anticipation of legal adoption; a stepchild; a foster child (defined as a child placed with you by an authorized placement agency or by a judgment or other order of a court of competent jurisdiction); a child for whom you/your spouse/your domestic partner are legal guardian by a valid court order; any child you are required to cover under a Qualified Medical Support Order (QMCSO).
- Disabled Child** An unmarried child of any age who falls under one of the above listed dependent categories, and due to a mental or physical disability, is unable to earn a living. The dependent must have been covered under the plan prior to turning 26 and continuously covered after 26, and must be wholly dependent upon the employee or employee's spouse for support and maintenance.

### REQUIRED DOCUMENTS

**ALL** required documents must include a date, employee and dependent(s) name. Please send COPIES ONLY, NO ORIGINALS; documents provided for this dependent verification will not be returned. See enclosed Frequently Asked Questions for instructions on redacting private information.

<b>Spouse</b>	<p>Marriage Certificate <b>AND ONE</b> of the following documents to show marriage is current:</p> <ul style="list-style-type: none"> <li>• A document dated within the past 6 months such as a mortgage statement, home equity loan, lease agreement, automobile registration, credit card or account statement, utility bill, or property tax document.</li> <li>• Page 1 and signature page of employee's 2015 or 2016 Federal Income Tax Return or Email Confirmation of Certificate of filing listing the spouse.</li> </ul> <p><b>Note: if the document lists SPOUSE ONLY it must reflect an address that is the same as the employee's address.</b></p>
<b>Domestic Partner</b>	<p>Domestic Partnership Affidavit and <b>ONE</b> of the following documents to show domestic partnership is current:</p> <ul style="list-style-type: none"> <li>• A document dated within the past 6 months such as mortgage statement, home equity loan, lease agreement, automobile registration, credit card or account statement, utility bill, or property tax document.</li> </ul> <p><b>Note: if the document lists DOMESTIC PARTNER ONLY it must reflect an address that is the same as the Trust member's address.</b></p>
<b>Child up to Age 26</b>	<p>Birth Certificate (issued by a vital records office) listing Trust member as parent. For the child of a domestic partner, Birth Certificate listing domestic partner as parent.</p>

<b>Adopted Child up to Age 26</b>	Adoption petition signed by a judge <b>OR</b> Birth Certificate (issued by a vital records office) listing Trust Member as parent. For the adopted child of a domestic partner, the Adoption petition signed by a judge <b>OR</b> Birth Certificate listing Domestic Partner as parent.
<b>Stepchild up to Age 26</b>	Marriage Certificate (indicating stepchild's biological parent is married to Trust Member), <b>AND</b> Birth Certificate of stepchild (issued by a vital records office) listing spouse as parent.
<b>Child up to Age 26 Under Legal Guardianship or QMCSO</b>	Birth Certificate <b>AND</b> Court Order signed by a judge verifying legal custody of the child; <b>OR</b> Medical Support Order issued by a State agency.
<b>Disabled Child</b>	Birth Certificate (issued by a vital records office) listing Trust Member or spouse as parent. For the child of a domestic partner, Birth Certificate listing Domestic Partnership or spouse as parent.