

Event Documentation Requirements

Triggering Event	Required Documents
New Hire	<ul style="list-style-type: none"> • Evidence of Insurability (EOI) if required • Documentation to verify dependent relationship is also required as noted on Pages 3 & 4. • Proof of Other Coverage (if waiving benefits)
Annual Enrollment	<ul style="list-style-type: none"> • Evidence of Insurability (EOI) if required • Documentation to verify dependent relationship for any new dependents being added to medical, dental and/or vision coverage as noted on Pages 3 & 4. • Proof of other coverage (if waiving benefits)
Marriage	<ul style="list-style-type: none"> • Proof of Marriage within 30 days of event • 1 Proof of Financial Interdependency Document • Proof of other coverage (if waiving benefits)
Divorce	<ul style="list-style-type: none"> • Copy of Divorce Decree/annulment/legal separation documents signed by Judge within 30 days of event
Birth/Adoption	<ul style="list-style-type: none"> • Birth Certificate/Proof of Adoption within 60 days of event
Qualified Medical Child Support Order (QMCSO)	<ul style="list-style-type: none"> • Copy of the court order
Death of Spouse/Child	<ul style="list-style-type: none"> • Date of death is required – No additional documentation is necessary
Death of Participant	<ul style="list-style-type: none"> • Date of death is required – No additional documentation is necessary
Dependent Gains Other Coverage	<ul style="list-style-type: none"> • Proof other coverage which verifies date other coverage begins which further verifies it is within 30 days of event
Dependent Loses Other Coverage	<ul style="list-style-type: none"> • Proof of loss of other coverage which verifies date other coverage ends which further verifies it is within 30 days of event • Documentation to verify dependent relationship is also required as noted on Pages 3 & 4 • Proof of other coverage (if waiving benefits)
Dependent Becomes Eligible for Medicaid	<ul style="list-style-type: none"> • Proof of Medicaid eligibility which verifies date of eligibility within 30 days of event
Dependent Loses Medicaid	<ul style="list-style-type: none"> • Proof of loss of Medicaid coverage which verifies date of loss of coverage within 30 days of event
You Gain/Lose Access to Other Coverage	<ul style="list-style-type: none"> • Evidence of Insurability (EOI) if required • Documentation to verify dependent relationship is also required as noted on Pages 3 & 4. • Proof other coverage which verifies date other coverage begins which further verifies it is within 30 days of event • Proof of loss of other coverage which verifies date other coverage ends which further verifies it is within 30 days of event
Job Status Change	<ul style="list-style-type: none"> • Evidence of Insurability (EOI) if required • Documentation to verify dependent relationship is also required as noted on Pages 3 & 4. • Proof of Other Coverage (if waiving benefits)

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Termination of Other Eligible Adult	<ul style="list-style-type: none"> • Signed affidavit certifying termination of Other Eligible Adult relationship within 30 days of event. OR • Proof of marriage within 30 days of event. *Note: Financial Interdependency Documentation would have been received under a prior process so additional documentation is not necessary
Addition of Other Eligible Adult	<ul style="list-style-type: none"> • Signed Affidavit certifying relationship of Other Eligible Adult Relationship within 30 days of event eligibility • 2 Pieces of Financial Interdependency Documentation as noted on Pages 3 & 4.
Other Eligible Adult Changes to Spouse	<ul style="list-style-type: none"> • Proof of Marriage within 30 days of event. *Note: Financial Interdependency Documentation would have been received under a prior process so additional documentation is not necessary
Waive Coverage	<ul style="list-style-type: none"> • Proof of other coverage is required each plan year unless participant is part-time or paying full cost of benefits
Overage Dependent (Age 26)	<ul style="list-style-type: none"> • No documentation is required – process occurs automatically based on DOB of child.

Continued on Pages 3 & 4

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Dependent Relationship	Required Documents
<p><i>NOTE: All Financial Interdependency documents MUST be dated within the past TWO YEARS, unless otherwise stated.</i></p>	
<ul style="list-style-type: none"> • Legal Spouse • Common-law Spouse (begun in Idaho prior to 1/1/1996 or valid in another state and recognized by Idaho state law) 	<p>Marriage certificate or common-law affidavit -AND- one proof of financial interdependency, such as a mortgage statement or rental/lease agreement, other loans or financial agreements, utility bills, or financial statement showing the spouse resides at the same address as the member. Please redact any financial information or social security numbers that may appear on these documents.</p> <p>-OR-</p> <p>A signed* copy of your last year’s federal tax return (front page through signature line). If your spouse’s filing status is Head of Household, Married Filing Separately, or Single, you must submit their tax return from the same year. Please redact any financial information or social security numbers that may appear on these documents.</p> <p>*Tax records must be signed, stamped as e-filed, submitted with an e-file receipt or clearly marked as prepared by a tax accountant / tax preparation service.</p> <p><i>Legally separated or divorced spouses are not eligible for coverage.</i></p>
<ul style="list-style-type: none"> • Other Eligible Adult 	<p>A Qualification Affidavit must be completed and notarized – AND- two documents proving financial interdependency, such as a mortgage statement or rental/lease agreement, other loans or financial agreements, utility bills or financial statement showing the other eligible adult resides at the same address as the member. Please react any financial information or social security numbers that may appear on these documents.</p>
<ul style="list-style-type: none"> • Natural Child 	<p>Birth certificate for <i>each dependent being enrolled</i> (EX: Employee is enrolling three dependent children; three windows need to populate for the employee to upload three separate birth certificates)</p> <p>-OR-</p> <p>A signed* copy of your last year’s federal tax return (front page through signature line). Please redact any financial information or social security numbers that may appear on these documents.</p> <p>*Tax records must be signed, stamped as e-filed, submitted with an e-file receipt or clearly marked as prepared by a tax accountant / tax preparation service.</p>

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<ul style="list-style-type: none"> • Stepchild 	<p>Birth certificate -AND- marriage certificate (even if spouse not enrolled on plan) <i>for each dependent being enrolled.</i></p> <p>-OR-</p> <p>A signed* copy of your last year's federal tax return (front page through signature line). Please redact any financial information or social security numbers that may appear on these documents.</p> <p>*Tax records must be signed, stamped as e-filed, submitted with an e-file receipt or clearly marked as prepared by a tax accountant / tax preparation service.</p>
<ul style="list-style-type: none"> • Adopted Child 	<p>Adoption Papers or Intent to Adopt Paperwork filed with the Court</p> <p>-OR-</p> <p>A signed* copy of your last year's federal tax return (front page through signature line). Please redact any financial information or social security numbers that may appear on these documents.</p> <p>*Tax records must be signed, stamped as e-filed, submitted with an e-file receipt or clearly marked as prepared by a tax accountant / tax preparation service.</p>
<ul style="list-style-type: none"> • Child of Other Eligible Adult 	<p>Birth certificate listing OEA as birth mother/father. If OEA birth mother/father last name is different than what is listed on the OEA affidavit, then divorce decree or other legal documentation proving OEA relationship to the child is required <i>for each dependent being enrolled.</i></p>