

**OEBB Dependent Eligibility Verification Program
Documentation Requirements**

Eligible Dependent Definition*	Required Documentation for Proof of Eligibility
<p>Legal Spouse</p> <p>A person who is married under the laws of the State of Oregon or under the laws of any other state or country. The definition of spouse does not include a former spouse and a former spouse does not qualify as a dependent.</p>	<ul style="list-style-type: none"> • Marriage Certificate: Must contain <ul style="list-style-type: none"> ○ Name of the member ○ Name of the spouse ○ Date of marriage ○ Certifier's signature and official seal ○ State or County of issuance <p><u>AND</u></p> <ul style="list-style-type: none"> • U.S. 1040 Tax Return Indicating Married (first page only): Must contain <ul style="list-style-type: none"> ○ Tax authority (Federal) ○ The most recent tax filing year ○ Name of the member ○ Name of the spouse ○ Married filing status (jointly or separately) <p><i>NOTE: To maintain confidentiality, please black out SSN and financial information. 1040 not required if marriage was same year as Dependent Eligibility Review, or year prior to review ending before April.</i></p> <p>If legally separated:</p> <ul style="list-style-type: none"> • Separation Agreement: Must contain <ul style="list-style-type: none"> ○ Name of the member ○ Name of the spouse ○ Date of separation ○ Must be dated and signed by Court <p><u>AND</u></p> <ul style="list-style-type: none"> • U.S. 1040 Tax Return (first page only): Must contain <ul style="list-style-type: none"> ○ Tax authority (Federal) ○ The most recent tax filing year ○ Name of the member ○ Filing status single or head of household

*Definitions of eligible dependents are subject to change with OEBB rule changes. Changes in the definition of eligible dependents may change the required documentation for proof of eligibility.

Domestic Partner by Certificate

An unmarried individual who has entered into a "Declaration of Domestic Partnership" with the eligible member that is recognized under Oregon law.

The following:

- **State-Issued Certificate of Registered Domestic Partnership:** Must contain
 - Name of the member
 - Name of the domestic partner
 - Certificate date
 - Certifier's signature and official seal

AND

- **Oregon OR-40 Tax Return Indicating Registered Domestic Partners:** Must contain
 - Tax authority (State)
 - The most recent tax filing year
 - Name of the member
 - Name of the registered domestic partner
 - Married filing jointly, or married filing separately

OR

- **U.S. 1040 "As If" Tax Return Indicating Married (first page only):** Must contain
 - Tax authority (Federal)
 - The most recent tax filing year
 - Name of the member
 - Name of the spouse
 - Married filing jointly, or married filing separately

NOTE: To maintain confidentiality, please black out SSN and financial information.

If legally separated:

- **Separation Agreement:** Must contain
 - Name of the member
 - Name of the registered domestic partner
 - Date of separation
 - Must be dated and signed by Court

AND

- **Oregon OR-40 Tax Return:** Must contain
 - Tax authority (State)
 - The most recent tax filing year
 - Name of the member
 - Filing status single or head of household

NOTE: To maintain confidentiality, please black out SSN and financial information.

Domestic Partner by Affidavit

Unless otherwise defined by a collective bargaining agreement or documented district policy in effect on January 31, 2008, means and includes the following:

An unmarried individual of the same or opposite sex who has entered into a partnership that includes the following:

- Both are at least 18 years of age.
- Are responsible for each other's welfare and are each other's sole domestic partners.
- Are not married to anyone and have not had a spouse or another domestic partner within the prior six months. If previously married, the six-month period starts on the final date of divorce.
- Share a close personal relationship and are not related by blood closer than would bar marriage in the State of Oregon.
- Have jointly shared the same regular and permanent residence for at least six months immediately preceding the date the Affidavit of Domestic Partnership is signed and submitted to the Educational Entity; and
- Are jointly financially responsible for basic living expenses designed as the cost of food, shelter and any other expenses of maintaining a household. Financial information must be provided if requested.

The following:

- **OEBB Affidavit of Domestic Partnership** upon enrollment: Must contain
 - Name of the member
 - Name of the domestic partner
 - Date
 - Signature of both partners

AND

One of the following (these documents must be dated within 6 months prior to the date of review):

- **Current Proof of Joint Mortgage or Joint Tenancy on a Residential Lease:** Must contain
 - Name of the member
 - Name of the domestic partner
 - Name of the mortgage company/landlord/rental company
 - Statement date from 6 months prior to the date of review; **OR**
- **Joint Bank Account or Joint Liabilities (credit cards, car lease):** Must contain
 - Name of the member
 - Name of the domestic partner
 - Name of the bank or lending company
 - Statement date from 6 months prior to the date of review
- **Auto Insurance or Utility Bill (electric, gas, phone, internet, cable, garbage, water):** Must contain
 - Name of the member
 - Name of the domestic partner
 - Name of the insurance or utility company
 - Bill date must be from 6 months prior to the date of review
- **Current State Issued Driver's License or State Issued ID:** Must submit BOTH
 - Driver's license or State ID for member, **AND**
 - Driver's license or State ID for domestic partner

NOTE: Both forms of ID must show same address and must be issued on or before the start of the review.

*NOTE: Employee may submit **one** document displaying both names, **OR** may submit **two documents, one in each name** showing the same address and dated within 6 months prior to review.*

Child of the Member, Spouse, or Domestic Partner

Includes any of the following age 25 and under:

- A biological child
- A legally adopted child or a child legally placed for adoption
- A legally placed child
- A stepchild

Grandchildren are only eligible when the eligible employee is the legal guardian or adoptive parent of the grandchild.

NOTE: For stepchildren, children of the domestic partner, or children legally adopted by the member's spouse or domestic partner, the member must also submit, as appropriate, proof of eligibility for Legal Spouse or Domestic Partner (see above).

Age limit is 26, and coverage ends at the end of the month in which dependent turns 26 unless child is eligible as Disabled Dependent Child (see below).

A Biological Child or Stepchildren

- **Government Issued Birth Certificate or Naturalization Certificate/Report of Birth**

Abroad: Must contain

- Name of the member, spouse, or domestic partner
- Name of the child
- Date of birth

NOTE: A marriage Certificate and most recent year's U.S. 1040 tax return, first page are also required if the biological parent of the Stepchild is not being covered on benefits.

A legally adopted child or child legally placed for adoption

- **Government Issued Birth Certificate or Naturalization Certificate/Report of Birth**

Abroad: Must contain

- Name of the member, spouse, or domestic partner
- Name of the child
- Date of birth

OR

- **Adoption Paperwork:** Must contain

- Name of the member, spouse, or domestic partner
- Name of the child
- Court ordered and signed legal adoption documentation

Legal Guardianship/Placement

- **Legal Documentation of**

Guardianship/Placement: Must contain

- Name of the member, spouse, or domestic partner
- Name of the child
- Issuing authority (court or state agency)
- Official signature, stamp, and/or seal

Disabled Dependent Child

Includes of the following age 26 or older:

- A biological child
- A legally adopted child or a child legally placed for adoption
- A legally placed child
- A stepchild

The person must be incapable of self-sustaining employment because of a developmental disability, mental illness, or physical disability and all the following requirements must be met:

- The person must have had group or individual health plan coverage prior to attaining age 26.
- The disability must have existed before age 26.
- Health plan coverage must have continued without a gap until the OEGB health plan coverage date.
- The person's attending physician must submit documentation to the employee's OEGB health insurance plan of the disability for review. The health plan may review the person's health status at any time to determine continued OEGB coverage eligibility.
- The person must not have terminated from OEGB health plan coverage after attaining the age of 26.
- The person must be your qualifying IRS dependent and must be claimed on your most recent years tax return,
OR
- The person files a tax return and demonstrates that their adjusted gross income does not exceed 150 percent of the federal poverty level (FPL),
OR
- The person is not your IRS dependent and does not file a tax return as indicated above, but you are the person's legal guardian.

The following:

- Same documentation requirements as child of member, spouse, or domestic partner

PLUS

- **U.S. 1040 Tax Return (first page only):** Must contain
 - Tax authority (Federal)
 - The most recent tax filing year
 - Name of the member
 - Name of the dependent

OR

- **U.S. 1040 Tax Return (first page only):** Must contain
 - Tax authority (Federal)
 - The most recent year's federal tax return
 - Name of the dependent
 - Adjusted Gross Income equal or less to 150% of the federal poverty level (FPL)

NOTE: To maintain confidentiality, please black out SSN and financial information.

OR

- **Court-ordered and signed legal documentation of guardianship:** Must contain
 - Name of the member
 - Name of the child
 - Date of birth

Imputed taxes may apply, per IRC provisions, when an employee enrolls and covers dependents on their OEGB coverage that are not claimed on their federal taxes, and thus are not tax dependents.