Documentation Needed for Open Enrollment/Qualifying Status Event

Adding or Canceling Coverage Due to Other Benefit Eligibility

☐ Letter from the spouse’s employer or from other insurance policy, on letterhead listing EACH impacted benefit (medical, dental, prescription) for EACH family member.
☐ The effective or termination date for EACH family member.
☐ The reason for the effective or termination date (open enrollment, change in family status event, separation from employment, etc…)

Foreign Documentation

☐ Must be translated into English.
☐ Must be notarized by a non-family member that the translation is correct.
☐ Employee cannot translate or notarize his/her paperwork.
☐ Both translated and foreign copies must be sent with paperwork.
☐ Community Colleges generally have a variety of foreign language instructors.

Documentation for Dependents Relocating to the United States

☐ Proof of permanent residency (driver’s license, lease agreement, state issued ID)
☐ School/Daycare records (minor)

Spouse Documentation

To add a spouse

☐ Affidavit for Dependent Eligibility and Tax Status
☐ Copy of an Official Marriage Certificate signed by a Court (not a religious order)
☐ Must have an Official Seal
☐ Marriage Certificates can be ordered (for a fee) online for marriages prior to 1994: www.vitalchek.com

To remove a spouse

☐ Copy of Limited divorce decree or Divorce decree
☐ Must be signed by a judge

A separation order or agreement is not a qualified change in family status permitting a midyear removal of a spouse.

Dependent Documentation

☐ Copy of Official Birth Certificate
☐ Birth Certificates can be ordered for a fee online at: www.vitalchek.com
Birth Certificates must show lineage. If the employee is the guardian of a grandchild, they must submit the child’s birth certificate and the grandchild’s birth certificate.

**Newborns**

One of the following is needed as acceptable temporary documentation until the birth certificate is received:

- Hand/Foot Prints issued by a hospital
- Registration of Birth
- Newborn’s Wrist band
- Discharge Papers
- Department of Budget & Management Affidavit for Dependent Eligibility and Tax Status

**Note:** Social Security cards are not acceptable.

The Official Birth Certificate must be received within 30 days from the date of DBM’s request for the official birth certificate. Failure to submit the birth certificate by the deadline date will result in no coverage for the newborn and the employee will have to wait until the next annual open enrollment period and provide all of the requested documentation with an effective date of the beginning of the plan year.

**Note:** Adding a newborn allows the employee to open a flexible spending account account or increase contributions to a dependent care flexible spending account or a health care account flexible spending account. Please refer to the flexible spending accounts section below.

**Disabled Dependents (Over age 26)**

- Disabled Dependent Certification Form (two years from the date of the last signed certification).
- DBM will not send a reminder. It is the employee’s responsibility to complete a new certification 30 days prior to the current certification form’s expiration date.
- DBM will send a letter stating if the certification has been approved or denied.
- Failure to submit a new certification will result in the termination of the dependent’s coverage and the employee will not be permitted to resubmit documentation until the next annual open enrollment period.

**Flexible Spending Accounts**

- FSAs are based on 24 pay periods per fiscal year
- List the amount per pay to be deducted.
- Healthcare Maximum $2,500
- Dependent Care Maximum $5,000 per fiscal year (maximum deduction when enrolling mid-year is $208.33 per DBM)
- To set up electronic deposit complete an Electronic Deposit Form (located on the Benefits Forms page)