

### Required Documentation for Dependent Eligibility

To be able to offer benefit coverage to you on a pre-tax basis, the Internal Revenue Service requires that we follow our plan rules and cover only eligible dependents. To ensure compliance with our plan documents, you are required to provide documentation to verify the eligibility of any dependents to be covered under benefits. Documentation must be submitted to Human Resources within 31 days of the qualifying event. You may submit via fax at (540) 857-5209, by email at [hrservicecenter@carilionclinic.org](mailto:hrservicecenter@carilionclinic.org) or interoffice mail (HR Office 1212 Third Street). Coverage for your dependents will not be effective until their eligibility is confirmed. The chart below lists the documentation required to verify your dependents.

Dependents	Eligibility Definition	Documentation Required
<b>Spouse</b>	A person to whom you are legally married.	<ul style="list-style-type: none"> <li>Photocopy of marriage certificate <b>or</b> a copy of the top half of the front page on your federal tax return for the year just filed (you may black out all financial information).</li> <li>The Request for Working Spouse/Domestic Partner Premium Waiver form may be required if you are enrolling your spouse in the Carilion Clinic Medical Plan.</li> </ul>
<b>Domestic Partner</b>	Refers to the partner of an eligible employee who is a domestic partner, sharing a long-term committed relationship of indefinite duration that meets the criteria listed in the Domestic Partnership Affidavit <b>or</b> is in a same-sex union in a jurisdiction that recognizes such union.	<ul style="list-style-type: none"> <li>Notarized Domestic Partnership Affidavit <b>or</b> photocopy of civil union certificate from a jurisdiction that recognizes such union. The Request for Working Spouse/Domestic Partner Premium Waiver form may be required if you are enrolling your domestic partner in the Carilion Clinic Medical Plan.</li> </ul>
<b>Children</b>	<p>Refers to your children, including stepchildren and children of your domestic partner, legally adopted children and children in a guardian-ward relationship.</p> <p>To be eligible to participate, your children must be under age 26.</p>	<p><u>Biological Children</u></p> <ul style="list-style-type: none"> <li>Photocopy of birth certificate showing your name <b>or</b> hospital certificate showing your name <b>or</b> a copy of the top half of the front page of the federal tax return for year just filed.</li> </ul> <p><u>Stepchildren or Children of your Domestic Partner</u></p> <ul style="list-style-type: none"> <li>Photocopy of birth certificate showing your spouse's or domestic partner's name <b>and</b> a copy of marriage certificate or documentation of domestic partnership (see above) <b>or</b> a copy of the top half of the front page of the federal tax return for the year just filed.</li> </ul> <p><u>Legal Guardian or Adoption</u></p> <ul style="list-style-type: none"> <li>Photocopy of Affidavits of Dependency, final court order with presiding judge's signature and seal <b>or</b> copy of the Adoption Final Decree with presiding judge's signature and seal <b>or</b> a copy of the top half of the front page of the federal tax return for the year just filed.</li> </ul>
<b>Dependent Children with Disabilities</b>	Refers to your children over age 26 who are physically and mentally incapable of self-support and disabled before age 26.	<ul style="list-style-type: none"> <li>Photocopy of Social Security disability award (if a disability ruling by Social Security is pending, include a current copy of the application for disability) <b>and</b> a copy of the top half of the front page of the federal tax return for year just filed.</li> </ul>

Falsifying reports and records, including both verbal and written is a Type II offense as defined in the Disciplinary Action Policy and may result in separation from employment. Such records include, but are not limited to employment applications, vouchers, reports, employee records, patient records, insurance claims, time and attendance records, leave of absence paperwork, disability, worker's compensation or other business documents.