Dependent Eligibility: Required Documents

At Milton CAT, we partner with employees to manage our health care costs, and one way to do this is by ensuring that only eligible dependents are enrolled in our plans. So before you hit the ground running, it's important to verify that all your enrolled dependents meet the required eligibility criteria.

The following is a list of all dependent eligibility documentation requirements for health benefits coverage for dependents.

For a Spouse

- Married one year or less: Submit a government issued marriage certificate.
- Married more than one year: Submit a government-issued marriage certificate **AND** a federal tax return filed within the last two years that reflects your married status. If filing **Married Filing Separately**, tax returns for both you and your spouse are required.

Important: For dependent verifications, your tax return will need to reflect your married status, either **Married Filing Jointly or Married Filing Separately**. The IRS generally requires individuals who are married as of December 31 to file using a married filing status, either Married Filing Jointly or Married Filing Separately. HR cannot provide individual tax advice, so questions regarding the appropriate filing status should be directed to your tax professional.

NOTE: *To maintain confidentiality when submitting your federal tax return, please blackout/redact all financial information and only send page 1 listing you and your spouse as your dependent.*

For a Child

- Biological child: Government issued birth certificate including parents' names
- Adopted Child: Copy of government issued birth certificate **AND** copy of the Court's final adoption certificate/decree placing the child with you. (If Court's document includes the child's DOB, the birth certificate isn't required).
- Stepchild: Must be spouse's child. One of the following combinations of documents are required:
    - Government issued birth certificate including parents' names **AND** a government issued marriage certificate if married for one year or less.
    - Government issued birth certificate including parents' names **AND** a government issued marriage certificate **AND** federal tax return filed within the last two years listing spouse as a dependent
    - Government issued birth certificate including parents' names **AND** government issued marriage certificate **AND** proof of joint ownership or proof of cohabitation issued within the last six months
- Legal Ward – Government issued birth certificate **AND** the court ordered document of legal custody
- Tax Dependent Child – Government issued birth certificate **AND** the federal tax return filed in the previous year listing the child as a dependent

Disabled Child—for children age 26 and older only:

NOTE: Disabled status for any child requires current medical certification from the health plan **in addition** to the documents listed below.

- Natural Child: Copy of government issued birth certificate **AND** a copy of your government issued marriage certificate **AND** a copy of your Federal Tax Return claiming child within the past 2 tax years
- Adopted Child: Copy of the Court's final adoption certificate/decree placing the child with you **AND** a copy of your Federal Tax Return claiming child within the past 2 tax years
- Stepchild: Copy of government issued birth certificate AND copy of your government issued marriage certificate AND a copy of your Federal Tax Return listing spouse and claiming child within the past 2 tax years