




Benefits Required Documentation for Dependents

When submitting supporting documentation:

- ✓ Mark out all confidential information such as financial data and social security numbers.
- ✓ Send only copies. *Documentation submitted will not be returned.*
- ✓ If a document is two-sided or multiple pages, ensure you copy both sides and all pages of the document.
- ✓ If a document is not in English, you may be requested to supply an official English translation of the document and a copy of the original document.

Eligibility Requirements	Acceptable Supporting Documentation
<p>Spouse <i>Your legal spouse</i></p> <p>Sample Federal 1040 Form </p> <p><i>Please mark out SSN's and Financial Info</i></p>	<p>Submit TWO documents – one document from PROOF A <u>AND</u> one document from PROOF B</p> <p>PROOF A: (to show event occurred)</p> <ul style="list-style-type: none"> Valid legal or religious marriage certificate, which must include: <ul style="list-style-type: none"> Name of the employee and spouse Date of informal marriage Certifier’s signature/official seal Presently valid state-issued certificate, declaration or registration of common law or informal marriage (in applicable states) which must include: <ul style="list-style-type: none"> Name of the employee and spouse Date of informal marriage Certifier’s signature/official seal Legal household/family registry - must show spousal relationship. <i>(This is only acceptable if you were married outside the U.S. and do not have a marriage certificate.)</i> <p>PROOF B: (to show current relationship status) <i>(Employees married within the last 12 months do not need to provide Proof B.)</i></p> <ul style="list-style-type: none"> Your Federal 1040 or State income tax return, which must: <ul style="list-style-type: none"> Be from current or previous tax year Contain name of employee and spouse Indicate married filing jointly or married filing separately NOTE: Only the page listing filing status and exemptions is required – see sample. E-Files are not accepted. Utility bill, which must: <ul style="list-style-type: none"> Be dated within the last 12 months Contain name of employee and spouse as joint owners Contain name of utility company Document from a bank account or financial institution, which must: <ul style="list-style-type: none"> Be dated within the last 12 months Contain name of employee and spouse as joint owners of the account Contain name of financial institution Insurance document such as homeowner, renter or automobile, which must: <ul style="list-style-type: none"> Be dated within the last 12 months Show employee and spouse as joint account owners (Individuals listed as “drivers” on automobile insurance documents do not prove joint account ownership) Contain name of insurance company Mortgage document or current lease, which must: <ul style="list-style-type: none"> Be dated within the last 12 months Contain name of employee and spouse as joint owners or joint renters Contain name of mortgage company, landlord or rental company Valid vehicle registration, which must: <ul style="list-style-type: none"> Be dated within the last 12 months Contain name of employee and spouse as joint owners Contain name of state or county in which issued

Eligibility Requirements

Domestic Partner

Your [same or opposites sex] domestic partner

Sample Federal 1040 Form



Please mark out SSN's and Financial Info

Acceptable Supporting Documentation


Submit TWO documents – one document from PROOF C AND one document from PROOF D

PROOF C:

- Valid [CLIENT] Domestic Partner Affidavit, which must include:
 - Names of the employee and domestic partner
 - Date of Notarization
 - Signature of Notary
- State-issued Certificate of Domestic Partnership, which must include:
 - Names of the employee and domestic partner
 - Date of Certificate
 - Certifier’s signature/official state seal

PROOF D:

- Utility bill, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners
 - Contain name of utility company
- Document from a bank account or financial institution, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners of the account
 - Contain name of financial institution
- Insurance document such as homeowner, renter or automobile, which must:
 - Be dated within the last 12 months
 - Show employee and domestic partner as joint account owners (Individuals listed as “drivers” on automobile insurance documents do not prove joint account ownership)
 - Contain name of insurance company
- Mortgage document or current lease, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners or joint renters
 - Contain name of mortgage company, landlord or rental company
- Valid vehicle registration, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners
 - Contain name of state or county in which issued
- Your Federal 1040 or State income tax return, which must:
 - Be from current or previous tax year
 - Name employee as person filing
 - Name of domestic partner listed as dependent with relationship of “Other”
 - NOTE: Only the page listing filing status and exemptions is required – see sample. E-Files are not accepted.

Eligibility Requirements	Acceptable Supporting Documentation
<p>Child under age 26 Your children until the end of the [month] that they reach age 26 which includes:</p> <ul style="list-style-type: none"> • A natural child, or a child placed with you for adoption • A stepchild • any other child for whom you have legal guardianship or court-ordered custody. <p>Sample Federal 1040 Form</p>  <p>Please mark out SSN's and Financial Info</p>	<p>Submit ONE document – one document from PROOF E</p> <p>PROOF E:</p> <ul style="list-style-type: none"> • Your Federal 1040 or State income tax return, which must: <ul style="list-style-type: none"> • Be from current or previous tax year • List your dependent with the relationship as daughter, son or child • NOTE: Only the page listing filing status and exemptions is required – see sample. E-Files are not accepted. • Child's legal or hospital birth certificate or affidavit of parentage, which must: <ul style="list-style-type: none"> • Contain the first and last name of employee or spouse* • Contain the name of the child • Indicate date of birth • Legal household/family registry - must show relationship. <i>(This is only acceptable if the child was born outside the U.S. and you have no legal birth certificate.)</i> • Final divorce decree, parental custody agreement or Qualified Medical Child Support Order (QMCSO), which must: <ul style="list-style-type: none"> • Contain the name of the employee or spouse indicating parentage of the child • Contain the name of the child • Official signature or stamp indicating document has been filed • Legal adoption, guardianship or legal custody papers, which must: <ul style="list-style-type: none"> • Contain the name of the employee or spouse • Contain the name of the child • Official signature or stamp indicating document has been filed <p><u>Also required to prove the relationship between you and your stepchild:</u> If you are an employee providing documentation for a child of your legal spouse [or Domestic Partner], H&R Block must receive the required proofs listed for Spouse (Proof A and B) [or Domestic Partner (Proof C and D)], even if you do not currently cover your spouse [or domestic partner].</p>

Eligibility Requirements	Acceptable Supporting Documentation
<p>Child under age 26 & over Any dependent disabled child, over the age of 26 who otherwise meets the current criteria for "child" and is:</p> <ul style="list-style-type: none"> • Permanently disabled and not able to earn his or her own living because of a physical or mental disability which started prior to the date he or she reaches the maximum age for dependent children under the Plan. 	<p>Submit TWO documents – one document from PROOF F <u>AND</u> one document from PROOF G</p> <p>PROOF F:</p> <ul style="list-style-type: none"> • Any one of the documents listed for Child under age 26. <p>PROOF G:</p> <ul style="list-style-type: none"> • Physician statement certifying that the dependent child: <ul style="list-style-type: none"> • Cannot support them self because of a physical or mental disability • All information must be included on physician's letterhead or form and dated within the last 12 months <p><u>Also required to prove the relationship between you and your stepchild:</u> If you are an employee providing documentation for a child of your legal spouse [or Domestic Partner], H&R Block must receive the required proofs listed for Spouse (Proof A and B) [or Domestic Partner (Proof C and D)], even if you do not currently cover your spouse [or domestic partner].</p>

Qualified Life Event	Acceptable Supporting Documentation
Birth/Adoption	Submit a Birth Certificate; or Hospital issued certificate of live birth (for newborns added withing 30 days of birth – Birth Certificate required when received).
CHIP/Medicare/Medicaid	Submit letter stating the effective date of coverage or loss of coverage date.
Deceased Dependent	Submit a Death Certificate.
Dissolution of Domestic Partnership	Submit an Affidavit of Dissolution of Domestic Partnership, located on BlockBenefits under Documents.
Divorce/Legal Separation	Submit a Court signed Divorce Decree; or Court signed Legal Separation Documentation.
Gain of other Coverage	Submit a letter from HR at the other company stating the benefits effective date.
Loss of other Coverage	Submit a letter from HR at the other company stating the benefits cancelled and the effective date of cancellation and Required documentation for any new dependents as listed above.
Marriage	Submit a Marriage Certificate or Marriage License with Court signature.