

Quick Guide to the Dependent Eligibility Audit



Dependent Eligibility Audit

Purpose: The dependent eligibility audit will help us comply with regulatory requirements and control costs by confirming that only eligible dependents receive coverage through our benefit plans.

Who Must Participate: Active and retired faculty and staff who cover dependents on a University medical, dental, vision, life, and/or tuition plan must provide documents (such as birth certificates or proof of residence in the same household) that confirm each dependent's relationship to them. (While some active and retired faculty and staff may have submitted such documents when they joined the University or added a newborn or spouse to their coverage, we know that circumstances change and not everyone may be aware of our eligibility requirements. As such, this audit extends to all active and retired faculty and staff with covered dependents, regardless of whether they have previously submitted the requested documentation).

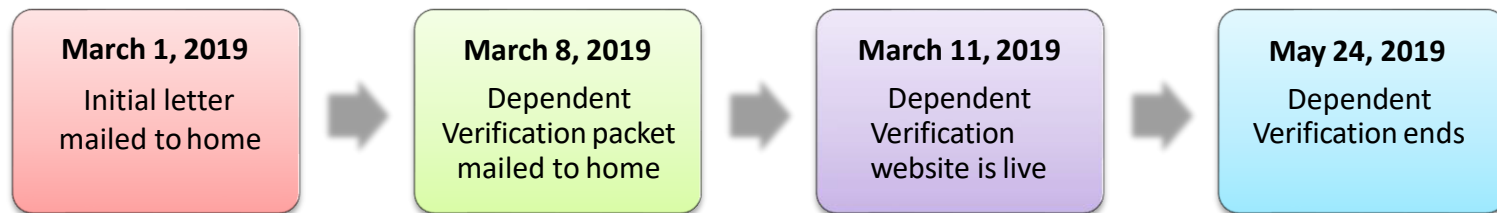
What if I Don't/Can't Participate?: If you *do not* submit the appropriate documents online, postmarked, or via fax by May 24, 2019, your dependents' University medical, dental, vision, life, and/or tuition coverage will end on **June 30, 2019**. If your dependents' coverage ends because you are *unable* to submit the appropriate verification documents due to extenuating circumstances (such as being out of the country for an extended period of time), there will be an opportunity to appeal.

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Verification Process: We've engaged a third-party vendor, Willis Towers Watson, to manage the dependent eligibility verification process.

- All active and retired employees who cover one or more dependents will be required to provide documents that confirm each dependent's relationship.
- Documentation can be submitted by mail, fax or online through Willis Towers Watson's secure verification website. The website information was included in materials mailed to the homes of plan participants with covered dependents.

Key Dates:



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Eligible Dependents

- Spouse
- Civil Union Spouse
- Domestic Partner (registered with the University on or before December 31, 2016)
- Child under the age of 26
 - ✓ Natural child
 - ✓ Stepchild
 - ✓ Legally adopted child, including a child placed for adoption with you
 - ✓ Child for whom you are required to provide coverage under a Qualified Medical Child Support Order
 - ✓ Child of your same-sex domestic partner or civil union spouse
- Child of any age who became incapable of self-sustaining employment due to disability prior to age 26, and who were covered under the applicable Benefit Program on their 26th birthday.

Acceptable Documentation

- Proof of relationship must be submitted by **May 24, 2019**, to Willis Towers Watson Dependent Verification Center.
- Examples of the type of documentation you will be asked to submit include birth certificates, marriage certificates, proof of residence in the same household, page 1 of federal or state tax return, etc.
- A full list of acceptable documentation per type of dependent is listed in the **Verification Packet** that was mailed to your home on March 8, 2019.
- **To protect privacy, please black out social security numbers and monetary amounts.** Documentation submitted will remain protected and confidential throughout the audit. Documents mailed or faxed will be promptly scanned to files. All personal information is stored behind firewalls and encrypted backup tapes. All paper documentation will be destroyed using a reputable shredding service 60-90 days after the verification process is complete.

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Resources

Willis Towers Watson Dependent Verification Center

- (855) 376-7203
- Monday through Friday, 9am-6pm (CST)

Lab Sessions

The Benefits Office is hosting weekly Open Lab Sessions to assist employees with uploading documents to Willis Towers Watson's secure verification website.

Location: 6054 S. Drexel Avenue, Room 146

Date: Every Tuesday from March 12, 2019 to May 21, 2019

Time: 12-2pm

Benefits Team

- Email: benefits@uchicago.edu
- Phone: (773) 702-9634
- Monday through Friday, 8:30am-4:30pm (CST)

Dependent Audit Website (Live March 2019)

<https://humanresources.uchicago.edu/benefits/dependentaudit.shtml>

- Updates
- Communication
- FAQs

Dependent Eligibility Documentation

TYPE OF DEPENDENT	ACCEPTABLE DOCUMENTATION (COPIES ONLY NO ORIGINALS) TO SUBMIT
Spouse or Civil Union Spouse	<p>One of the following:</p> <ul style="list-style-type: none"> • Marriage Certificate • Civil Union Certificate <p>AND Any one of the following:</p> <ul style="list-style-type: none"> • Driver's licenses or other state issued identification of employee and spouse/civil union spouse with matching addresses • Page 1 of federal or state tax return (1040, 4506, 4506-T, 8879 or M8453) from one of the prior two years, listing spouse/civil union spouse¹ • Immigration papers (if marital status is listed)
Domestic Partner	<p>Any three of the following:</p> <ul style="list-style-type: none"> • Joint mortgage or lease • Designation of domestic partner as beneficiary for life insurance & retirement contract • Designation of domestic partner as beneficiary in employee's Legal Will • Durable property and health care power of attorney • Joint ownership of motor vehicle, joint checking account, or joint credit account
Child • Biological	<p>One of the following:</p> <ul style="list-style-type: none"> • Birth certificate (copy of original)[#] • Paternity/maternity test (notarized) • Court-approved child support order
Child • Adopted	<p>One of the following:</p> <ul style="list-style-type: none"> • Reissued birth certificate (listing adoptive parent names) • Adoption papers • Court-approved child support order
Child • Stepchild	<p>One of the following:</p> <ul style="list-style-type: none"> • Birth certificate (copy of original)[#] • Reissued birth certificate (listing adoptive parent names) • Paternity/maternity test (notarized) • Adoption papers • Court-approved child support order • Court-approved guardianship papers <p>AND</p> <p>One of the following:</p> <ul style="list-style-type: none"> • Marriage certificate of parents • Civil Union certificates of parents
Child • Child of Domestic Partner	<p>One of the following:</p> <ul style="list-style-type: none"> • Birth certificate (copy of original)[#] • Paternity/maternity test (notarized) • Court-approved child support order <p>AND</p> <p>Any three of the following:</p> <ul style="list-style-type: none"> • Joint mortgage or lease • Designation of domestic partner as beneficiary for life insurance & retirement contract • Designation of domestic partner as beneficiary in employee's Legal Will • Durable property and health care power of attorney • Joint ownership of motor vehicle, joint checking account, or joint credit account

Documents and resources located at:

<https://humanresources.uchicago.edu/benefits/dependentaudit.shtml>

To protect privacy, please black out social security numbers and monetary amounts.

¹ To protect your privacy, black out Social Security numbers and all financial information or monetary amounts appearing on any documents submitted.

[#] A birth certificate includes the name of at least one parent covered under The University of Chicago's medical, dental, vision or life plans or eligible for tuition benefits.

In the event of a conflict between what is stated in this document and the governing plan document(s), the plan document(s) will control.