



WAKE FOREST UNIVERSITY VERIFICATION DOCUMENTS

Dependent Category	Documents Required to Complete Dependent Verification	
<p>Legal Marriage (Opposite Sex or Same Sex)</p> <p>Marriages in Current Year: Send the Legal Marriage Certificate only.</p>	<p style="text-align: center;">Option 1 <u>Legal Marriage Certificate</u> <u>AND Most Recent 1040 Tax Form</u></p> <div style="text-align: center;">  </div> <p>Send a copy of your <u>legal marriage certificate</u></p> <p style="text-align: center;">AND</p> <p>Send a copy of the <u>first page of your 1040 federal income tax return showing a married filing status.</u></p> <ul style="list-style-type: none"> • If you file separately, send the first page of both your and your spouse's federal income tax return. • Redact any financial and personal information on tax forms (i.e. ssn or salary information) • Do not send W-2s. 	<p style="text-align: center;">Option 2 <u>Legal Marriage Certificate</u> <u>AND Two Joint Financial Documents</u></p> <div style="text-align: center;">  </div> <p>Send a copy of your <u>legal marriage certificate</u></p> <p style="text-align: center;">AND</p> <p>Send copies of <u>two current joint financial documents showing you and your spouse at the same address.</u> Examples of joint financial documents include: mortgage statement, joint homeowners or renters, auto loan, personal loan, credit card, and utility bill (except mobile phone bills). Documents must be dated within the past 60 days.</p>
<p>Biological Child</p>	<p><u>Birth Certificate</u></p> <ul style="list-style-type: none"> • Send a copy of the child's birth certificate, which is required for each biological child <u>6 months old or older.</u> The birth certificate must be issued by the state, county, or other government body AND list the faculty or staff member as a parent. <p style="text-align: center;">OR</p> <p><u>Hospital Letter</u></p> <ul style="list-style-type: none"> • If a birth certificate is not available for a child under 6 months old, submit <u>birth documentation on hospital letterhead</u> indicating the birth date of the child AND the name(s) of the parent(s). <p style="text-align: center;">OR</p> <p><u>Court Order</u></p> <ul style="list-style-type: none"> • If a birth certificate is not available, a <u>court order</u> (such as a Qualified Medical Child Support Order, National Medical Support Notice, or other court document) may be substituted. 	
<p>Adopted Child</p>	<p><u>Placement Papers OR Adoption Agreement OR Birth Certificate</u></p> <ul style="list-style-type: none"> • Send a copy of the <u>placement papers</u> for a child placed with you for adoption 	

	<p>(initial stage), OR <u>Official Court Adoption Agreement</u> for an adopted child (mid-stage), OR <u>legal birth certificate</u> (final stage).</p> <p style="text-align: center;">OR</p> <p><u>Court Order</u></p> <ul style="list-style-type: none"> • If a birth certificate is not available, a <u>court order</u> (such as a Qualified Medical Child Support Order, National Medical Support Notice, or other court document) may be substituted.
Stepchild	<p><u>Birth Certificate</u></p> <ul style="list-style-type: none"> • Send a copy of the child’s government-issued <u>birth certificate</u> showing that the child’s parent is the faculty or staff member’s spouse. <p style="text-align: center;">AND</p> <p><u>Legal Marriage Documents</u></p> <ul style="list-style-type: none"> • See notes in the Legal Marriage section for information about submitting these documents.
Other Child Type	<p>For a grandchild, niece/nephew, brother/sister, or other child type, send either guardianship OR custody papers.</p> <p><u>Guardianship Papers</u></p> <ul style="list-style-type: none"> • Send court papers demonstrating legal guardianship. The document must include the name(s) of the person(s) designated as the legal guardian(s). <p style="text-align: center;">OR</p> <p><u>Custody Papers</u></p> <ul style="list-style-type: none"> • Send court papers demonstrating custody. The document must include the name(s) of the person(s) designated as the custodian(s).

Submit the required dependent verification documentation if you are adding a spouse and/or a dependent child(ren) to your medical and/or dental plan(s) and have not previously submitted documentation. Submit your qualifying event request, along with supporting documentation in Workday within 30 days of the event. Redact all personal and financial information (i.e. Social Security number or salary details) from these documents.