

# Documentation Guide



# Table of Contents

**Section I:** Required documentation for dependent verification upon Initial or Annual Enrollment

**Section II:** Required documentation for a Qualifying Life Event (such as marriage, birth, loss of other coverage) or change in benefits eligibility status

**Section III:** How to submit your documents

# I. Dependent Eligibility Verification

To verify a dependent, in most cases\*, your most recent Form 1040 Tax Return will fully satisfy the requirements for dependent eligibility. For alternative documentation options, see next slide.

**1** Take a screenshot of the top portion of the 1040 tax return.

**2** Mark out your SSN and financial information.

**3** Ensure your taxable dependents are listed.

Submit in one of the following ways:

1. Upload to Benefits Enrollment System (from DGme homepage, click DGWell, then select the Benefits Enrollment System link)
2. Use the EmpyreanGo app (register using company ID: **DG**)
3. Mail to P.O. Box 2987  
Bellaire, TX 77402
4. Fax to 1.866.771.7269

\*Not applicable if adding a foster child. See slide 4 for acceptable documents.

# Acceptable Forms to Verify Your Dependent (other than Form 1040 Tax Return)



Dependent Relationship	Other Acceptable Forms of Dependent Eligibility Documentation
Biological Child	Birth Certificate –OR– Paternity Documentation on Lab Letterhead
Adopted Child	Adoption Paperwork –OR– Amended Birth Certificate
Step-Child	Child’s Birth Certificate <b>AND</b> Marriage Certificate <b>AND</b> Proof of Spousal Joint Ownership♦
Foster Child	Court Issued Guardianship/Custody Documents
Child via Legal Guardianship/Legal Custody	Court Issued Guardianship/Custody Documents <b>AND</b> Most Recent 1040 Federal Tax Return * Recent Legal Guardianship/Legal Custody: If guardianship or custody was appointed in the current or previous calendar year AND a Federal Tax Return is not available, submit a completed Attestation of Financial Support and Residency in place of the Federal Tax Return. (Contact the Benefits Service Center at 1-844-861-0002.)
Legal Spouse	Marriage Certificate <b>AND</b> Proof of Spousal Joint Ownership♦ * Recent Marriage: If marriage occurred within the current or previous calendar year AND a Federal Tax Return or proof of joint ownership is not available, you may submit just a marriage certificate to satisfy verification requirements.
Common Law Spouse	Affidavit of Common Law Marriage if approved in the state of residence (contact the Benefits Service Center at 1-844-861-0002) AND Proof of Spousal Joint Ownership♦

Acceptable forms of **Proof of Spousal Joint Ownership (dated within the last 6 months)** include: mortgage statement or lease agreement, bank statement **OR** utility bill. ***Be sure your documentation includes both the employee and spouse names.***

## II. Qualifying Life Event (QLE) and Dependent Verification

Required documentation for a Qualifying Life Event (such as marriage, birth, loss of other coverage) or change in benefits eligibility status:

- Verify your event – Documentation on slides 6-7 must be submitted to substantiate the date you experienced the life event or status change
- Verify your dependent(s) – In addition to verifying the event, you must also submit acceptable forms of dependent verification on slides 3-4 for any new dependent

The enrollment/change request will NOT be approved unless you provide **ALL** documentation by the deadline noted in the Enrollment System.

# Acceptable Forms to Verify Your Event

Qualifying Life Event	Acceptable Forms of Documentation
Birth, Adoption or Placement for Adoption	Birth Certificate – <b>OR</b> – Birth Certification (Hospital Letter) Adoption Papers, Court Approved Adoption Paperwork, Paternity Documentation on Lab letterhead
Marriage	Marriage Certificate
Divorce/Legal Separation	Divorce Decree – <b>OR</b> – Legal Separation Papers signed by a Judge
Death of Dependent	Death Certificate
Gain of other Coverage	Proof of gaining other coverage <ul style="list-style-type: none"> <li>• Documentation from new insurance company (Certificate of Credible Coverage); OR</li> <li>• Letter from Employer AND new insurance ID cards</li> </ul> <u><b>Documents must include effective date of the new coverage and names of those covered.</b></u>
Loss of other Coverage	Proof of loss of other coverage <ul style="list-style-type: none"> <li>• Documentation from prior insurance company (Certificate of Credible Coverage); OR</li> <li>• Letter from Employer</li> </ul> <u><b>Documents must include date coverage ended and name of those affected by the change.</b></u>

# Acceptable Forms to Verify Your Event, *continued*

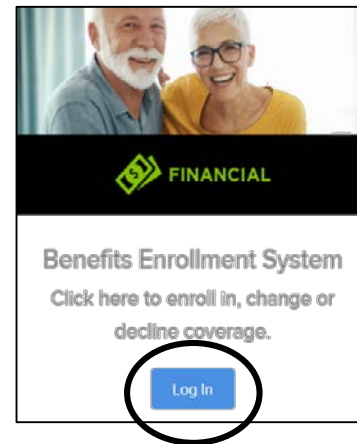
Qualifying Life Event	Acceptable Forms of Documentation
Guardianship or custody of a child	Court documents appointing guardianship or custody of child to the employee
Loss of Medicaid or CHIP Coverage	Proof of loss of other coverage <ul style="list-style-type: none"> <li>• Loss of coverage due to nonpayment, failure to renew paperwork and other voluntary reasons are not valid</li> </ul> <u><b>Documents must include date coverage ended and name of those affected by the change.</b></u>
Change of Disabled Dependent Status	Social Security Disability Letter
Dependent Care Change (Dependent Care FSA Only)	Proof of Change in Residence or Work Site <b>AND</b> Proof of significant change in day care expenses (ex. Letter from day care provider, billing or invoice documents)
Significant change in cost or plan coverage of existing benefits	Proof of significant change in cost or plan coverage of existing benefits
Spouse Annual Enrollment	Proof of Annual Enrollment dates occurring after Dollar General Annual Enrollment period

**If adding a new dependent, see slides 3-4 to understand acceptable forms of dependent documentation.**

# III. Submitting Your Documents

Employees can submit their complete documentation (not in an editable format, like a Word document), in one of the following ways:

1. Upload to Benefits Enrollment System (from DGme homepage, click DGWell, then select the Benefits Enrollment System link)



2. Use the EmpyreanGo app (register using company ID: **DG**)



3. Mail to P.O. Box 2987 Bellaire, TX 77402

4. Fax to 1.866.771.7269



# Need Assistance?

Please contact the Dollar General Benefits Service Center by calling 1-844-861-0002  
Monday – Friday, 8 a.m. to 5 p.m. Central Standard Time.