



Required Documentation Checklist – Spouse

Spouse (opposite sex and same sex marriage)

- Copy of official Marriage License
- Copy of Social Security Card

Two (2) of the following with at least one (1) reflecting financial responsibility dated within the previous six (6) months and the other one (1) reflecting financial responsibility dated within the previous twelve (12) months:**

- Common ownership of real property or common leasehold interest in property
- Joint or Bank account statement with the same address
 - Employee's most recent bank statement and spouse's most recent bank statement both showing the same address
- Joint or Major Credit Card Statement with the same address (VISA/MasterCard/Discover/Amex)
 - Employee's most recent credit card statement and spouse's most recent credit card statement both showing the same address
- Proof of shared living expenses for the same property
- Beneficiary form for life insurance or retirement benefits designating spouse as primary beneficiary (not the County beneficiary form)
- Current Vehicle Registration with same address
 - Two recent vehicle registrations (one for each person) that lists the same address
- Designation of spouse as Power of Attorney/Health Care Power of Attorney
- Status of authorized signatory on spouse's bank account, major credit cards
- Jointly insured on a current policy document (car, property or homeowner's)
 - This includes car insurance card where both husband and wife (spouses) are named as insured (not driver)
- Redacted copy of the front and signature pages of the most recent filed tax return - referencing the spouse (this may be slightly older than 12 months) or IRS Electronic Confirmation of most recent filing with both spouses named

**If married outside of the United States, marriage license must be officially translated by a translation organization before being submitted to your HR Service Center*

***The only exception to this documentation requirement is if the marriage occurred within the previous 12 months (from the date the documentation is received). If married within 12 months, only marriage license and social security card is required.*

Employee Acknowledgment:

I understand that I MUST submit a copy of the required documentation to an HR Service Center no later than ___/___/___ (30 days of hire or 60 days of a qualified life event). I also understand that if I miss this deadline, I **WILL NOT BE ELIGIBLE** to enroll or make changes in Orange County Government's insurance plans until the annual open enrollment period or at the time when I have a qualifying life event.

Employee Signature _____

Date _____

Employee ID _____

HR Representative _____

Date _____

