



December 1, 2015

CalPERS ID

First Last
Address
City, State, ZIP Code

Dear First Last,

We are writing to inform you of recent regulatory changes that impact the eligibility of your Parent-Child Relationship (PCR) dependent. You are receiving this letter because you have one or more PCR dependents enrolled on your CalPERS health plan. Please review the following information and take necessary action regarding your certification or annual recertification.

**Approved
Regulatory
Changes**

Section 599.500(o) of the California Code of Regulations, defines a PCR as “intentional assumption of parental status, or assumption of parental duties by the employee or the annuitant, as certified by the employee or annuitant at the time of enrollment of the child, and annually thereafter up to the age of 26...”

The regulations now clearly state that in addition to the completed ***Affidavit of Parent-Child Relationship*** (Affidavit), which has also been revised, for initial enrollment and annual recertification you are required to submit specific documents (based on the PCR dependent’s age, as outlined in the following pages) that substantiate your parental role within that PCR.

**Revised
Affidavit of
Parent-Child
Relationship**

The revised Affidavit is attached to this letter. You are required to complete the revised Affidavit and submit the required supporting documentation for all new PCR enrollments and annual re-certifications. You may also download the revised Affidavit by visiting CalPERS On-Line at www.calpers.ca.gov.

To locate the revised Affidavit, visit www.calpers.ca.gov and select **Forms & Publications, then click View All, and filter by Forms**. Look for “***Affidavit of Parent-Child Relationship***”. The new Affidavit has a revision date of June 2015 on the bottom of the form.

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**Requirement
for PCR
Dependent
Under Age 19**

Beginning January 1, 2016, for your PCR dependent under age 19, regulations require you to submit a copy of the first page of your income tax return, listing the child as a tax dependent during the previous year.

For a period not to exceed one tax filing year, in lieu of a tax return, you may submit other documents that substantiate the child's financial dependence upon you.

Other supporting documents include:

- Current legal judgments/court documents showing legal parental status or duties/guardianship over the child
- Bank statements/payments
- Credit card statements/payments
- Tuition statements/ payments
- Insurance statements/payments
- School records
- Bills or mail indicating a common residency with the dependent.

The one-year tax filing period for children under age 19 will end on **April 30, 2017**. All re-certifications received on or after **May 1, 2017**, will require you to submit a copy of the first page of your most recent income tax return. **No exceptions will be allowed.**

Note: When submitting copies of tax documents, household bills or account statements, subscribers should blackout sensitive information, such as driver's license numbers, and bank, credit card, and other financial or policy account numbers. Also, mark each document "Not for Official Use."

**Requirement
for PCR
Dependent Age
19 to 26**

Beginning January 1, 2016, for your PCR dependent ages 19 to 26, regulations require that you submit the following types of required documentation, along with the completed Affidavit, for your upcoming annual recertification:

- A copy of the first page of your income tax return from the previous tax year listing the child as a tax dependent , **OR**
- Other Suitable PCR Documentation, that substantiates that the child is financially dependent upon you provided that the child:
 - Either lives with you for more than 50 percent of the time, or is a full-time student, AND
 - Is dependent upon you for more than 50 percent of the child's support.

Requirement for PCR Dependent Age 19 to 26
(continued)

You are required to provide documents that substantiate **both** residency **AND** financial dependence. The following table provides examples of the types of documentation that may establish eligibility for PCR dependents between the ages of 19 to 26:

Requirement Type	Supporting Documentation (Age 19-26)
Residency (more than 50% of the time)	<ul style="list-style-type: none"> • School records indicating full-time status, or • Bills or mail in the child’s name listing the same address as the subscriber, such as: <ul style="list-style-type: none"> – School correspondence – Employment correspondence – Bank statements or correspondence – Vehicle registration, insurance bills/statements – Credit card bills/statements – Rental/lease agreements
Financial Dependence (more than 50% of child’s support)	<ul style="list-style-type: none"> • Recurring bills or statements of account, identified as Other Suitable PCR Documentation, paid by the subscriber on behalf of the child, such as: <ul style="list-style-type: none"> – Tuition payments – Cell phone bill payments – Auto loan payments – Auto insurance payments – Credit card payments – Bank statement, custodian account, cancelled checks, or other evidence of financial dependence.

Note: When submitting copies of tax documents, household bills or account statements, subscribers should blackout sensitive information, such as driver’s license numbers, and bank, credit card, and other financial or policy account numbers. Also, mark each document “Not for Official Use.”

Submitting Affidavit and Supporting Documents

You will receive reminder notices from CalPERS prior to your PCR annual re-certification period.

Active employees: If you are an active employee, submit your Affidavit and the required documentation to your Health Benefits Officer or Personnel Office. **Do not send your documents to CalPERS.** CalPERS cannot forward the documents to your employer on your behalf.

Retirees: If you are a retiree, CalPERS is your Health Benefits Officer. Submit your Affidavit and supporting documentation to CalPERS.

Questions

Active employees: If you are an active employee and have additional questions regarding this letter, contact your Health Benefits Officer or Personnel Office.

Retirees: If you are a retiree, contact the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

Attachment: ***Affidavit of Parent-Child Relationship*** (Rev. June 2015)

Sincerely,

Member Health Benefit Account Services
Customer Support Services