

Parent Child Relationship Economically Dependent Children

The Enrollment of an economically dependent child(ren) who lives with the employee requires the completion of an Affidavit of Parent-Child Relationship form (HBD-40)

<https://www.calpers.ca.gov/docs/forms-publications/affidavit-parent-child-form.pdf>

If coverage is approved within 60 days following the date the child(ren) becomes an economically dependent child, the enrollment will become effective on a prospective basis. Enrollment forms submitted 60 days after the permitting event (date dependent became an economically dependent child) are considered late enrollments, and the effective date of the coverage for new dependent(s) will be the first of the month following a 90 day waiting period from the date the enrollment form was received by the Benefits office. The employee **must complete a Benefits Enrollment Form, provide the birth certificate and Social Security number of the economically dependent child(ren).**

Eligibility and Supporting Documentation Certified "Parent-Child Relationship" (PCR)

Upon enrollment and annually thereafter, the employee must:

- Sign the Affidavit of Parent-Child Relationship (HBD-40), under penalty of perjury, that the information they are providing is true and correct
- Acknowledge that it is unlawful to make false representation or to present false information

Effective January 1, 2016, members are now required to fully complete the new HBD-40 Affidavit of Parent-Child Relationship form and submit the required supporting documents for new and recertification requests. Effective May 1, 2017, all subscribers recertifying a PCR dependent under age 19 must submit a copy of the first page of their income tax return form from the previous tax year listing the child as a tax dependent. **No exceptions will be allowed.** Required supporting documentation for a PCR dependent **under** age 19 includes:

- Current legal judgments or court documents showing the subscriber's legal parental status or guardianship over the child;
- Bank, credit card, tuition or insurance statements or payments;
- School records;
- Bills or mail indicating common residency with the child

Required supporting documentation for a PCR dependent **from** age 19 and older up to age 26 includes:

- A copy of the first page of the subscriber's 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 the subscriber provided that the child:
 - Either lives with the subscriber for more than 50 percent of the time, or is a full-time student, AND
 - Is dependent upon the subscriber for more than 50 percent of the child's support.

- A copy of the first page of the subscriber’s income tax return from the previous tax year listing the child as a tax dependent.
- In lieu of a tax return, for a time not to exceed one tax filing year, subscribers may submit other documents that substantiate the child’s financial dependency upon them, including the following (collectively referred to as "Other Suitable PCR Documentation"):

The chart below provides examples of the required supporting documentation used to establish residency and financial dependence:

Supporting Documentation Age (19-26)

Eligibility & Supporting Documentation Certified "Parent-Child Relationship",	
Residency (more than 50% of the time)	<ul style="list-style-type: none"> • School records indicating full-time status, 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.