



Montana Unified School Trust (MUST) – Group Health Benefits Plan
DECLARATION OF ADULT DEPENDENT

Note for opposite-gender partners: Your signature on this document may be considered proof of a common law marriage which carries the same rights and responsibilities as a solemnized marriage.

Employee Name \_\_\_\_\_

Employing School District \_\_\_\_\_

Please identify your eligible adult dependent below:

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Social Security Number \_\_\_\_\_

Eligibility

I certify as an employee of the \_\_\_\_\_ (School District or Entity) and an enrolled participant in the MUST group medical benefit plan, that the above identified person meets the following criteria for an eligible adult dependent, and I have not claimed a spouse or another adult dependent. (Documentation of the criteria below must be made available for review upon request.)

The eligible adult dependent:

- A. Is at least 18 years of age;
B. Has had joint ownership or joint tenancy of a residence with me for at least the most recent twelve (12) consecutive months...
C. Does not meet the MUST eligibility requirements of a spouse or a dependent child;
D. Does not have a parental relationship with me;
E. Is not related to me by blood or marriage;
F. Has a financially-interdependent relationship with me as evidenced by at least three (3) of the following:
1. Joint ownership or lease of a motor vehicle;
2. At least one joint liability such as a loan or credit card;
3. Mutually-granted powers of attorney or mutually-granted health care powers of attorney;
4. Designation of each other as primary beneficiary in wills, life insurance policies, or retirement annuities.

The following are eligible dependents according to the terms of the MUST Summary Plan Document:

\_\_\_\_\_ ; \_\_\_\_\_ ; \_\_\_\_\_

CRITERIA CERTIFIED \_\_\_\_\_

District Clerk

**Notification of Change in or Termination of Adult Dependent Relationship**

I agree that, if the adult dependent relationship as designated above no longer exists, I will notify my employer and Plan Administrator within 60 days of such change.

**Certification**

I understand all of the following:

1. The eligibility and coverage of an adult dependent will cease at the end of the month in which any of the above criteria (A through F) are no longer met;
2. Under federal and state law, benefit coverage of certain adult dependents described above may result in taxable income to the employee and may be subject to income tax withholding and applicable payroll taxes;
3. Coverage for an eligible adult dependent may only be activated during open enrollment or if an applicable qualifying event occurs during the plan year;
4. Montana Unified School Trust must be given written notice within thirty (30) days from the employer of any change in circumstances attested to in this document;
5. Falsely or fraudulently certifying eligibility for adult dependent coverage or failing to inform MUST of a relevant change in eligibility requirements in any respect may result in immediate termination of coverage of the adult dependent and the employee and the adult dependent may be subject to criminal prosecution, fine, or imprisonment as provided by law;
6. The employee will be liable for all expenditures for coverage and benefits obtained because of any misrepresentation or omission in certifying eligibility for benefit or in failing to inform MUST of a change in eligible criteria.

I further understand and acknowledge that the Montana Unified School Trust reserves the right to require copies of any or all of the above-listed documents. If I fail to provide the copies when requested, I understand that medical benefit coverage for the named adult dependent will be immediately terminated.

I certify and affirm that the eligibility assertions made herein are true and correct to the best of my knowledge and that I understand my obligations as stated herein.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Date

\_\_\_\_\_  
Adult Dependent Signature

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Date

**AFFIRMATION**

State of \_\_\_\_\_)

County of \_\_\_\_\_)

: ss.

On this \_\_\_\_\_ day, of \_\_\_\_\_, 200\_\_\_\_\_, before me, a notary public, personally appeared \_\_\_\_\_ and \_\_\_\_\_, who made known to me to be the

persons who executed the within affirmation and acknowledged to me that they executed the same for the purposes therein stated.

(seal)

\_\_\_\_\_  
Signature of Notary Public

Printed Name \_\_\_\_\_

Residing at \_\_\_\_\_

My Commission Expires: \_\_\_\_\_