

Required Documentation for UCRP Benefit Elections

Monthly Retirement Income (UBEN 161) or Lump Sum Cashout Election (UBEN 165)

- Member signature (POA, Guardian, Conservator acceptable if approved by RASC)
- **Married***: Signature of spouse required, even if legally separated
- **Domestic Partner***: Signature of Domestic Partner required
- **Signature**: Digital (via UCRAYS), "Wet" signature (including faxed/scanned copy), Electronic with time stamp (ex: Docusign or Adobe verified signature)

*Contact RASC for more information if spouse/partner cannot be located for signature

Divorce/Legal Separation or Termination of Domestic Partnership

If you were divorced, legally separated, or terminated your domestic partnership during your period of UCRP membership and are:

Electing monthly retirement income

Submit a copy of your dissolution of marriage or termination of domestic partnership

Electing lump sum cashout

Submit a copy of:

- dissolution of marriage or termination of domestic partnership
- settlement agreement with specific language that your UCRP benefits are your sole and separate property

See the [Domestic Relations Order Factsheet](#) for more details

Contingent Annuitant

- Birth Evidence

Eligible Spouse

- Marriage Evidence

Eligible Domestic Partner

- Domestic Partnership Evidence

Eligible Child

- **Under age 18**: Birth Evidence
- **Age 18 to 22**: Birth Evidence, Evidence of Significant Support and Student Enrollment

Disabled Child

For UCRP benefits beyond age 22:

- Birth Evidence
- Evidence of Significant Support and Student Enrollment (if disabled between 18-22)
- Approval by RASC Disability Unit

For Retiree Health benefits beyond age 26:

- Medical Carrier Approval

Dependent Parent

- Evidence of Significant Support, Member's Birth Evidence (listing parent(s) name)

Acceptable Documents

All documents:

- Must be accompanied by a **certified English Translation** if a non-English language document
- Originals are not needed; digital, electronic, or paper copies are accepted as long as they are legible
- Be sure the identity of the member is made clear on the document
- Documents that appear altered will not be accepted

The RASC will contact you if any documents are not accepted or if anything additional is required.

Types of acceptable documents:

Marriage Evidence

- Marriage Certificate with official seal
- IRS 1040 Tax Return showing “Married – Filing Jointly” signed at least one year prior to retirement or active death (must include page with “written” or “electronic” signature and date signed)
 - o For example: the tax return for calendar year 2022 is acceptable for a July 1, 2024 retirement if filed/signed prior to July 1, 2023
- Grant Deed (if Deed includes both names name, and lists as joint tenants)
- Passport (if Passport lists spouse’s name and issuance date of Passport)

Not accepted: Ceremonial marriage certificates or marriage licenses

Domestic Partnership Evidence

- Civil declaration of Domestic Partnership with official seal
- UBEN 250 – Declaration of Domestic Partnership for UCRP +
Two pieces of evidence of financial interdependence, both dated at least 1 year prior to date of retirement or preretirement death (see UBEN 250 for types of acceptable evidence)
- Certification of health dependent eligibility as domestic partner through UC’s Family Member Eligibility Verification

Birth Evidence

- Birth Certificate/Delayed Birth Certificate with official seal
- US or Foreign Passport (can be expired)
- Green Card/Permanent Resident Card
- Certificate of Naturalization (showing age at certain year or birthdate)
- REAL ID
- Military Records
- If born prior to 1950:
 - o Statement from Social Security giving date of birth according to their records
 - o Baptismal Certificate, church records, bible entry (if issued before age 21)
 - o School Records (showing age at certain year or birthdate)
 - o Insurance Policy, Census Records, or Medical Records (if issued before age 21)

Not accepted: Driver’s License/Government IDs that are not REAL ID compliant or high school diploma

Verification of Student Enrollment

- Records from high school, community college, university, or other educational system showing enrollment at 50% or greater.

Significant Support

- Copy of most recent tax return showing parent(s) and/or child(ren) as tax dependent(s) (must include page with “written” or “electronic” signature and date signed)
- Records of child support

Legal Name Change

- Court approved legal name change documentation
- Marriage Certificate with official seal (if changing legal last name)
- Passport
- Real ID (other drivers licenses/government IDs are not accepted)

Lived or Preferred Name and/or Gender Identity

- Active Employees: Complete via UCPATH
- All others (retired, disabled, survivors, inactive/former member, alternate payees, etc):
 - o Complete via UCRAYS, or
 - o *UBEN 175 – Lived Name and/or Gender Identity Information Form*

Certain correspondence (such as tax statements, benefit income statements, legal documents and insurance enrollment) may be sent to the individual's legal name consistent with UC Policy and federal and state regulations.

Social Security Number

- New Social Security card / Individual Tax Identification Number (ITIN) in conjunction with a Driver's License/Government ID (as supporting evidence)
- Official court approved documentation showing SSN or Tax ID change