

To: Full-time Appointed Employees
From: University Human Resource Services
Date: March 12, 2002
Subject: Domestic Partner Benefits

On September 14, 2001, the Trustees of Indiana University passed a resolution approving “benefits to same-sex domestic partners of Indiana University employees and students who demonstrate that they are in a verifiable committed relationship.” The university will implement the benefits listed below for qualified domestic partners and qualified children of domestic partners, **effective April 1, 2002.**

Benefit plans for Academic and Staff employees

- Medical and dental coverages
- IU Fee Courtesy (tuition subsidy)
- Basic Life Insurance (dependent coverage)
- Personal Accident Insurance (family coverage)

Personnel policies for Staff employees

- Funeral time-off provisions
- Sick time-off provisions
- Family and Medical Leave Act (FMLA) provisions

Associated changes in Academic personnel policies are not covered by this document; related questions should be addressed to a campus Academic Affairs office.

To take advantage of these benefits for a same-sex domestic partner and any associated child, an employee will first need to register the domestic partnership with the university by completing an Affidavit of Domestic Partnership. After completing that process, an employee would follow the normal benefit plan enrollment provisions for the domestic partnership.

Domestic Partnership Registration

To register a same-sex domestic partner and any associated children, the employee needs to complete an Affidavit of Domestic Partnership form with notarized signatures. This form is available at campus Human Resources offices and www.indiana.edu/~uhrs/. The completed form needs to be delivered to a campus Human Resources office for final action.

The following is an illustration of the criteria to qualify as a domestic partner: same sex as the employee; at least 18 years of age; not legally married or the domestic partner of another individual; and has lived with the employee as a couple for at least six consecutive months.

This registration is intended to be kept confidential, except for information that will need to be shared with other administrative offices and third-party vendors to process plan enrollments and claims.

Benefit Plan Enrollment (Academic and Staff employees)

Medical, Dental and Personal Accident plans: A special enrollment period is available for the enrollment of a qualified domestic partner and any associated child. This one-time special enrollment period for existing domestic partnerships ends on May 17, 2002, with enrollments being effective April 1, 2002. Enrollment forms for medical, dental and Personal Accident plans are available at campus Human Resources offices and www.indiana.edu/~uhrs/. (These enrollment forms should be submitted to a campus Human Resource office along with the Affidavit of Domestic Partnership form to expedite the processing of health care plan coverage.)

After May 17, the enrollment of a domestic partner or associated child is limited to the same time periods as a spouse or dependent child. For example, mid-year changes are restricted to the sixty-day period following the date a domestic partner or associated child first becomes eligible.

Federal regulations do not allow provisions of the Tax Saver Benefits plan to apply to a domestic partner or an associated child, unless they otherwise qualify as the employee's IRS dependent.

Fee Courtesy and Basic Life Insurance: Enrollment is handled like any other qualified dependent. Fee Courtesy benefits for a qualified domestic partner or associated child will begin with Summer Session I, 2002.

Personnel Policies (Staff employees)

Funeral, Sick Time and FMLA: Use of time off is handled like any other qualified dependent. (The above-referenced Affidavit of Domestic Partnership form will be the used to register the domestic partnership for these policies applicable to Staff employees.)

Income and Employment Taxes (value of benefits provided to a domestic partner)

In general, both the University's contribution and employee's contribution to medical, dental, Personal Accident and Fee Courtesy benefit coverage is treated as taxable income to the employee, per IRS regulations. In the case of medical, dental and Fee Courtesy benefits, the taxable income to an employee can be a significant amount. Information for estimating the taxable income amount of domestic partner benefits may be obtained at campus Human Resources offices and www.indiana.edu/~uhrs/.

Refer to www.indiana.edu/~uhrs/ for additional information about this subject.

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