

## Your Checklist to Obtain Health Insurance Coverage

*We are pleased you have selected us to assist you in meeting your insurance needs. We will do our best to make the process efficient and painless for you. Please do a little preparation and obtain the information indicated for your situation below and bring it to our appointment. This helps us help you.*

*If you have collected the information, enter it on the "Fillable Pre-Enrollment Form" e-mailed or sent in the mail. It is easy to complete - and will save significant time at our appointment. You may not need to complete every line if the requested information on the form does not apply to you.*



### *Individual and Family Health Insurance*

- Completed 'Pre-Enrollment' Form
- First & last names, & birth dates of all household members.
- Social Security numbers for all household members.
- Gross annual income for each employer & net annual income from self-employment sources for all 'dependent' household members.
- Addresses of all employers for all household members
- Citizenship documentation if you are not a U.S. born citizen.
- Email address



### *Special Qualifying Event*

*You can obtain insurance coverage outside the 'Open Enrollment Period' if any of the following events occur. You must provide documentation to demonstrate the 'event' occurred. There is a 60-day window to enroll in a plan when 'Special Qualifying Event' occurs.*

Event: Loss of employer sponsored insurance coverage.

- Letter from employer on company letterhead stating date of termination & loss of coverage & names of covered dependents.

Event: New employee not eligible for employer sponsored insurance.

- Letter from employer on company letterhead stating you are not eligible for coverage.

Event: No Longer eligible for student insurance.

- Letter from school stating date student coverage was terminated.

Event: Turned 26, no longer eligible to be covered by parent's plan.

- Proof of terminated coverage from parent's insurance.

Event: Moved to California from out of state or between counties within California.

- Utility bills or rental agreement from previous and current address with your name on bills.

Event: Recently married or entered into a domestic partnership.

- Certificate of marriage or domestic partner registration with state of Ca.

Event: Birth or adoption a baby.

- Certificate of birth or adoption.

Event: Obtained U.S. Citizenship or lawful residence in the U.S.

- U.S. passport, Certificate of Citizenship, Naturalization or Green Card.

## Your Checklist to Confirm Your Coverage

- Pay your 1st month premium to activate your policy & verify payment was processed.
  - Have you received your ID card for your plan within 4 weeks of submitting application?
    - ➡ Let us know if you have not.
  - Confirm the plan on your ID card is the plan you chose.
  - Confirm payments on your new plan are correct.
  - Confirm your old plan was cancelled when you change insurance carriers. If you had a plan with a subsidy, CoveredCa will cancel your previous plan. If you had a plan without a subsidy, it your responsibility to call the carrier and cancel the plan.
  - Cancel payments on discontinued policies & always with your bank or credit card provider.
  - Start a file of all notices from your insurance carrier & CoveredCa.
    - ➡ Have these notices in hand when you call us for assistance.
  - If you obtained an HMO, select a primary care provider (PCP) or determine to which provider you have been assigned.
    - ➡ If you want different PCP, call your plan immediately. Don't wait until you need an appointment.
  - Consider enrolling in prescription delivery by mail? (it can be cheaper and very convenient )
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Your Notes: