Health Insurance Checklist

Required Application Information:

- Names, birthdates, and SSNs for all household members applying for coverage
- Home and mailing addresses (unless experiencing homelessness)
- Immigration documents for all non-US citizens
- If offered, employer-sponsored insurance (ESI) information including plan name, policy number, and monthly premium amount (if ESI is ending, provide coverage end-date and request termination letter from the carrier directly)

Current Income Information & Proofs for All Applicants:

- Job (W-2, last 30 days' worth of paystubs, recent Form 1040 tax filing)
- Self-employment (1099, most recent quarterly Profit & Loss statements, recent Form 1040 tax filing)
- Social Security or Disability (benefits letters)
- Unemployment (benefits letters)
- Retirement, Pension/Annuities (distribution statements)
- Capital Gains/Losses (Schedule 1 & D of Form 1040 filing)
- Taxable Interest, Dividends, Money Markets, CDs, or other investment income (Schedule B of Form 1040 filing)
- Rental/Royalty, S-Corp/LLC income
- Lottery or Gambling winnings
- Alimony
- Driver's license of state ID (not required)

Deductions Reported on Federal Tax Filing (Form 1040):

- Educator expenses, higher education tuition & fees, alimony paid, Health Savings Account deductions, deductible part of self-employment tax (Line 14), SEP/SIMPLE contributions (Line 15), self-employed health insurance (Line 16), IRA deductions (Line 19), student loan interest (Line 20).

Plan Selection:

- Names of primary care providers (PCPs), specialists, behavioral health providers, dental providers, prescriptions, preferred facilities hospitals, urgent care or community health centers for all applicants.

Next Steps:

- Pay premium by the 23rd of each month; initial enrollment is not complete until payment is received.
- Submit proof for any requests for information (RFI) within 60-90 days of application submission date. Visit https://www.mahealthconnector.org/verification-documents for a list of acceptable documents. Our Navigators can help you prepare proof of current income.
- Gain online account access by calling the HC customer service to log into the application.

*Before providing **any** PII (personally identifiable information) via email or text, speak with your Navigator to determine the best, most secure way to send sensitive information. *