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State/Territory Name: Hawaii

State Plan Amendment (SPA) #: 13-008-MM

This file contains the following documents in the order listed:

DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
San Francisco Regional Office
90 Seventh Street, Suite 5-300 (5W)
San Francisco, CA 94103-6706

Division of Medicaid & Children's Health Operations

August 26, 2014

Patricia McManaman, Director
Department of Human Services
P.O. Box 339
Honolulu, HI 96809-0339

Dear Ms. McManaman:

On October 25, 2013, the Centers for Medicare & Medicaid Services (CMS) approved Hawaii's State Plan Amendment (SPA) 13-0008-MM with an effective date of October 1, 2013. This SPA included approval for the State to use an interim alternative single streamlined online application until March 30, 2014.

The CMS has reviewed the changes submitted with respect to Hawaii's alternative single streamlined online application. The revised application addresses the concerns outlined in the companion letter that was issued with the SPA approval. This letter serves as official approval of Hawaii's alternative single streamlined online application.

Enclosed is a copy of the approved alternative single streamlined online application. Please incorporate these pages into the State Plan following the attachment to S94 entitled "Use of the Alternative Single Streamlined Application."

If you have any additional questions or require any further assistance, please contact Christy Bonstelle at (415) 744-3522 or Christy.Bonstelle@cms.hhs.gov.

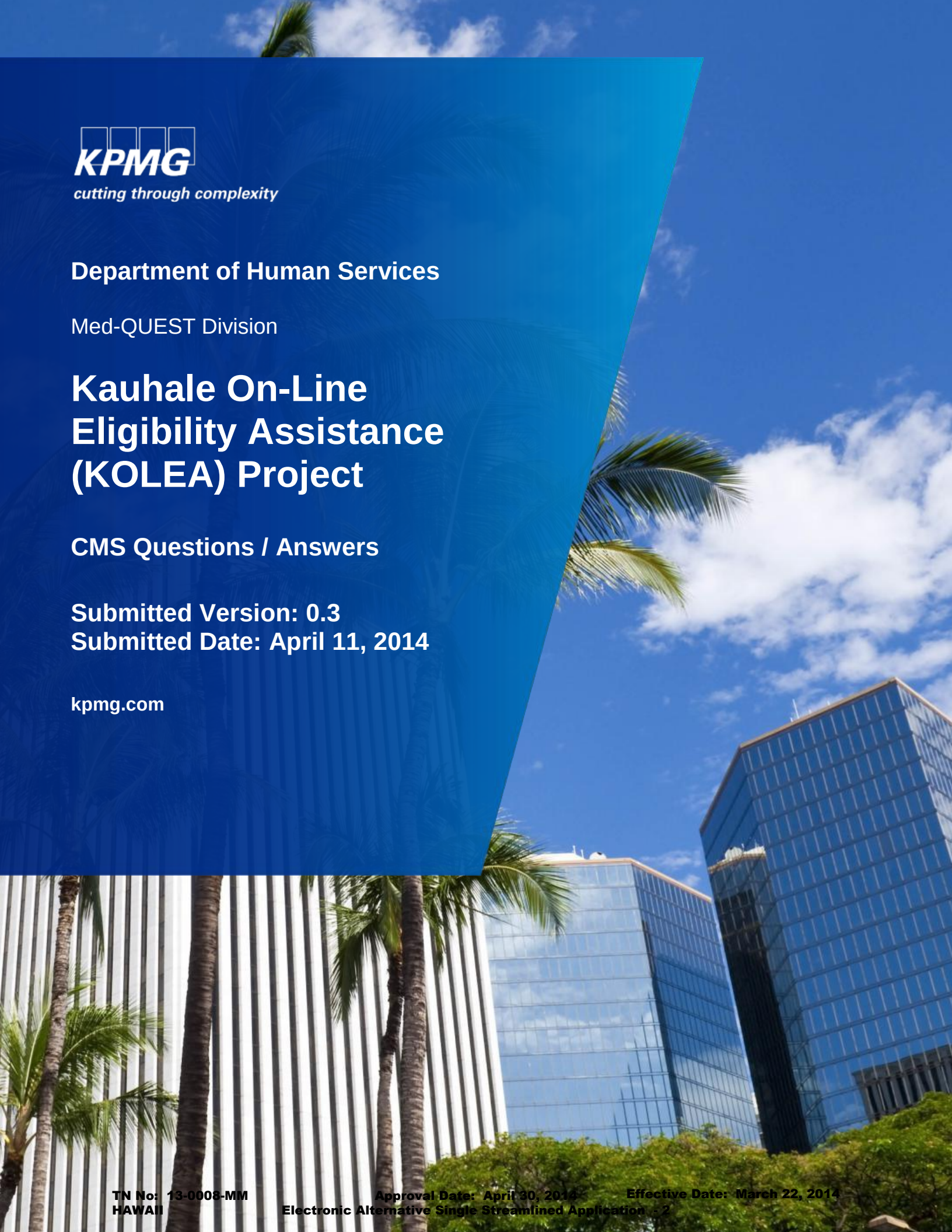
Sincerely,

/s/

Hye Sun Lee
Acting Associate Regional Administrator
Division of Medicaid and Children's Health Operations

Enclosure

USE OF THE ALTERNATIVE SINGLE STREAMLINED APPLICATION ☐ Paper Application ☒ Online Application	
TRANSMITTAL NUMBER: 13-0008-MM	**STATE:** Hawaii
Through March 31, 2014, the state is using an interim online alternative single streamlined application. After March 31, 2014, the state will use a revised online alternative single streamlined application, which will address the issues outlined in the CMS letter dated October 1, 2014 concerning the state's application. The revised application will be incorporated by reference into the state plan.	



KPMG
cutting through complexity

Department of Human Services

Med-QUEST Division

Kauhale On-Line Eligibility Assistance (KOLEA) Project

CMS Questions / Answers

Submitted Version: 0.3
Submitted Date: April 11, 2014

kpmg.com

Revision History

Date	Version	Description of Updates	Author
2/25/2014	0.1	Initial Draft	KPMG
4/10/2014	0.2	Revision Per DHS Feedback	KPMG
4/11/2014	0.3	Revision Per DHS Feedback	KPMG

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1. Purpose and Background

The purpose of this document is to provide a response to a request from Centers for Medicare & Medicaid Services (CMS), requesting an update on the recent revisions to the online alternative single streamlined application developed by the State of Hawaii (State Plan Amendment (SPA) transmittal HI #13-0008-MM, October 25 2013). CMS approved the use of an interim online alternative single streamlined application with the condition to revise the form to reflect the following changes, by March 31st 2014.

1 CMS Question - Tobacco use: Will it be possible to move this post-eligibility for Day One? If not, can language be added that it's not relevant for Medicaid and CHIP and that it's doesn't impact eligibility?
- Interim Solution - The following language was added to the tobacco use question: "Your response to the following questions does not affect medical assistance eligibility."
- Revised Solution (Post 3/22/2014) - The tobacco use question will not be asked of applicants.

2 CMS Question - Do the questions related to access to employer sponsored coverage and special enrollment periods only show up for applicants with attested household incomes above applicable Medicaid and CHIP MAGI limits?
- Interim Solution- The following language appeared before the special enrollment question "Your response to the following questions does not affect medical assistance eligibility"
- Revised Solution (Post 3/22/2014) - The special enrollment period questions will not be asked of applicants requesting medical assistance.
- Response- The employer sponsored coverage questions appear for households with household members who are potentially eligible for APTC or potentially eligible for Medicaid under Title XXI (CHIP) to check for potential minimum essential coverage.

The sections below demonstrate that the changes have been made to the online alternative single streamlined application per CMS instructions.

2. KOLEA Online Single Streamlined Application Change Summary

The sections below describe the two major changes made to the KOLEA Online Single Streamlined application per CMS guidance with the 3/22/2014 Release.

Each section provides:

- Description of the change
- Previous Portal Summary bar snapshot containing a list of all the screens visited by an applicant and a screenshot of the removed screen/question
- Revised Portal Summary bar snapshot containing list of all the screens highlighting the removed screen/question

2.1. Tobacco Question – CMS Question 7

Tobacco use: Will it be possible to move this post-eligibility for Day One? If not, can language be added that it's not relevant for Medicaid and CHIP and that it doesn't impact eligibility?

Interim State (October 1st 2013): Language has been included to indicate this question will not impact eligibility. Additionally, this question is only asked for Applicants over age 18 years prior to the confirmation page.

Revised per CMS recommendation (March 22nd, 2014): As this question will not impact medical assistance eligibility the question is not asked.

Please refer to Figures 1 & 2 which depicts the list of questions that were asked as part of the interim design and the list of questions that are currently asked in the revised design. Updates that have been made are highlighted in the summary bar.

Figure 1 - Interim Application Flow

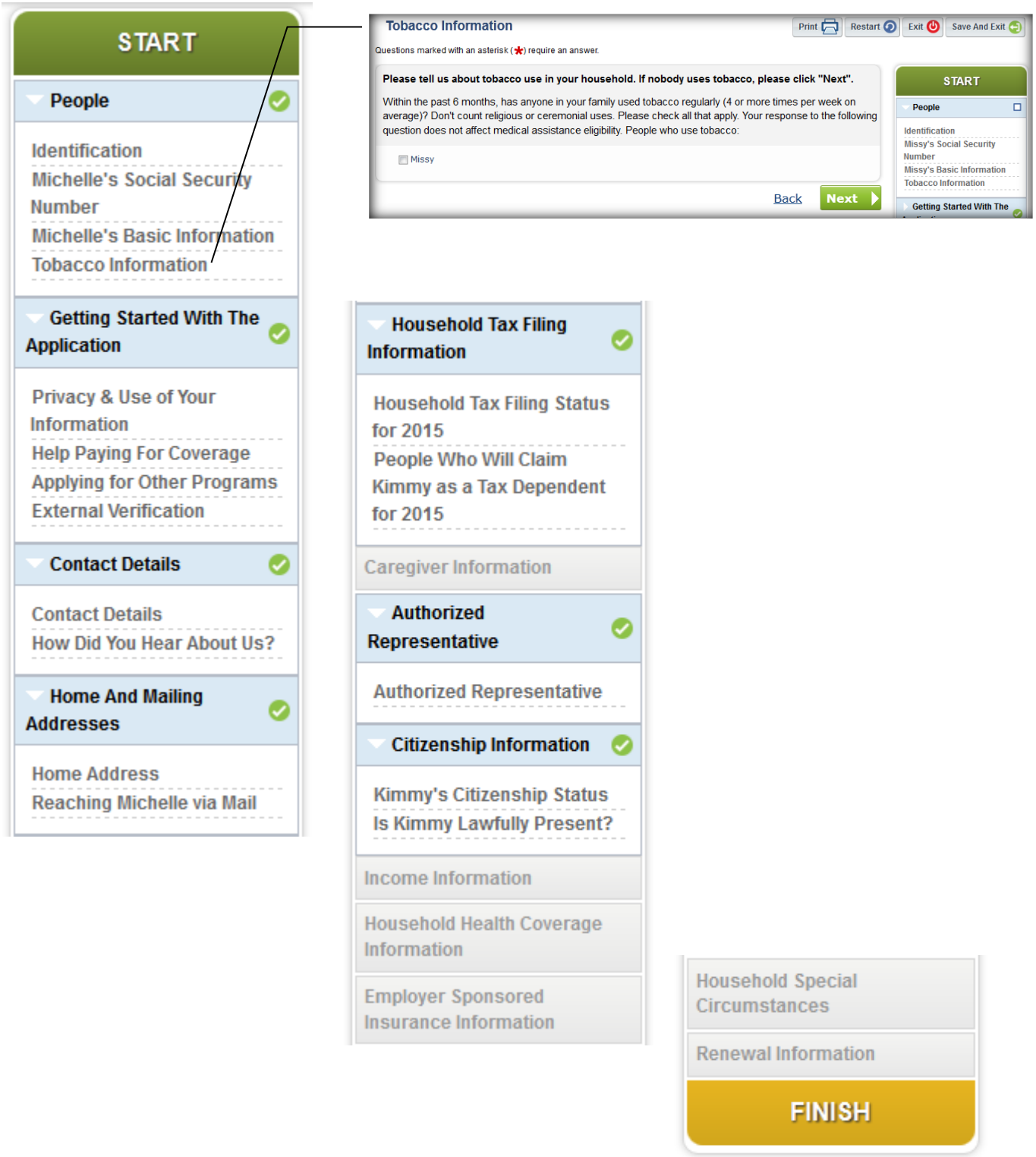
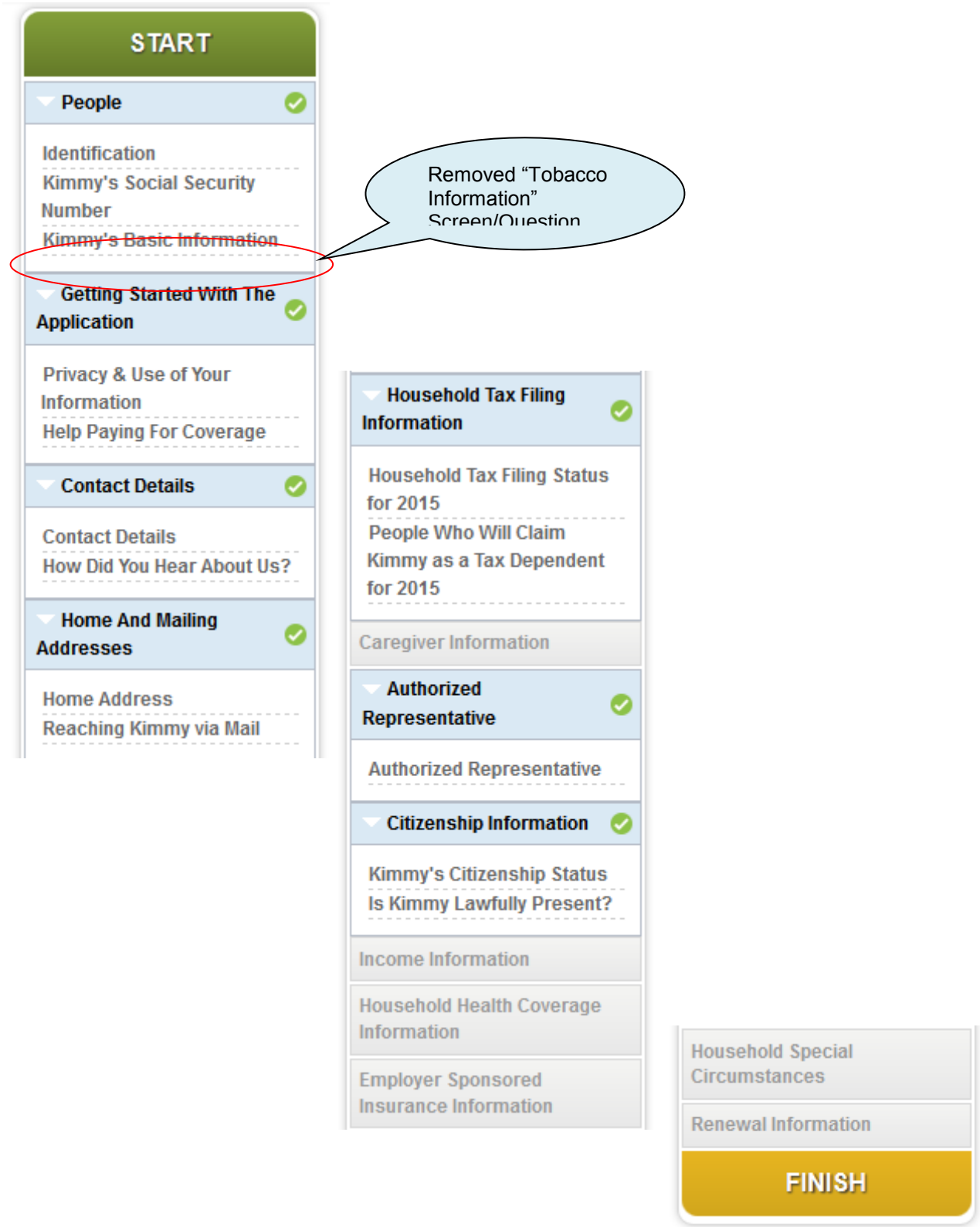


Figure 2 - Revised Application Flow (highlighting the impacted screen/question)



2.2. Special Enrollment Question – CMS Question 2

Special Enrollment: Do the questions related to access to employer sponsored coverage and special enrollment periods only show up for applicants with attested household incomes above applicable Medicaid and CHIP MAGI limits?

Interim State (October 1st, 2013): The Special Enrollment questions were asked of all Applicants starting December 16th, 2013.

Revised per CMS recommendation (December 20th, 2013): The Special Circumstance questions were suppressed effective December 20th, 2013 as these questions did not impact medical assistance eligibility.

Please refer to Figures 3 & 4 which depicts the list of questions that were asked as part of the interim design and the list of questions that are currently asked in the revised design. Updates that have been made are highlighted in the summary bar.

Figure 3 - Interim Application Flow and the Impacted Screen

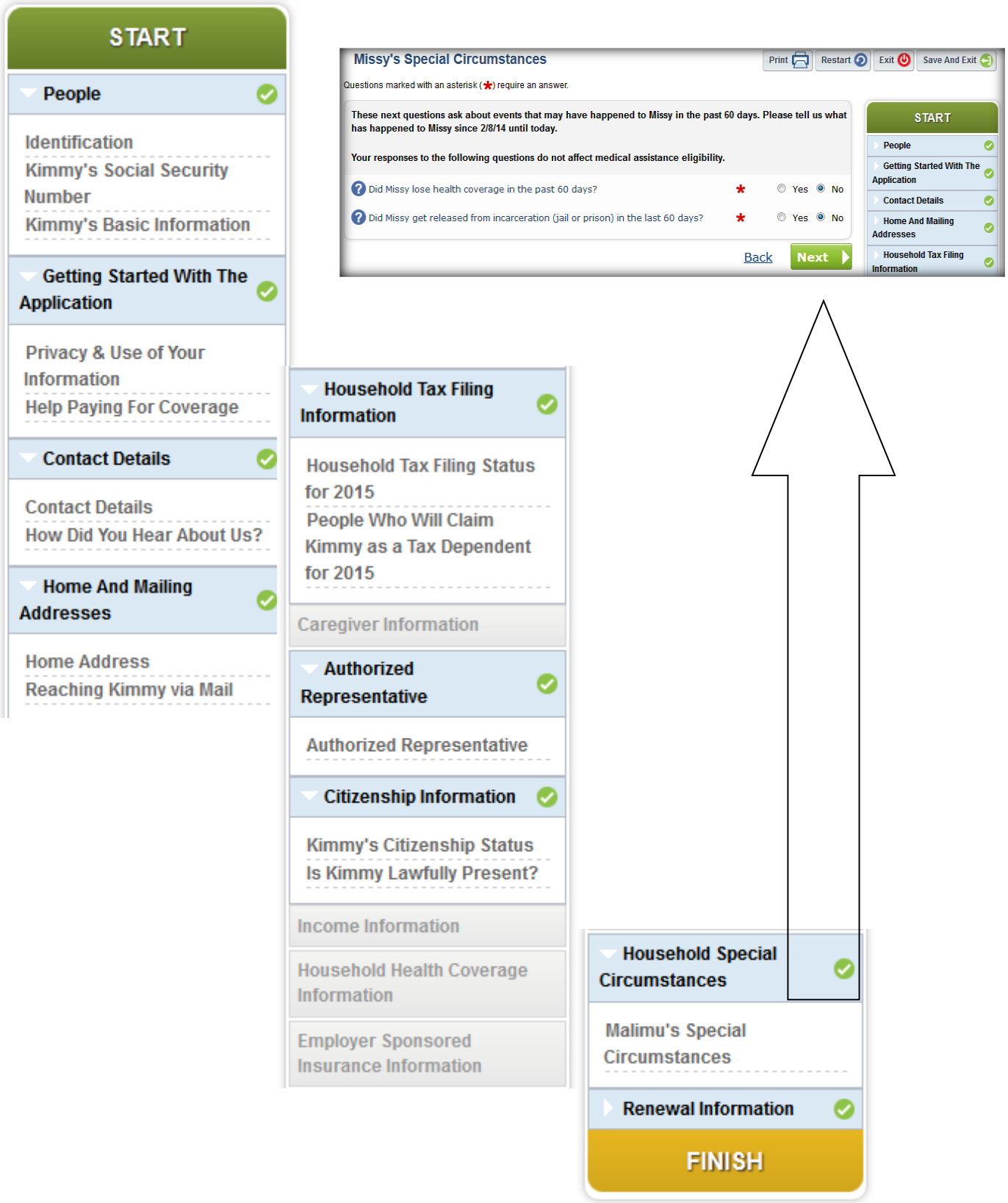
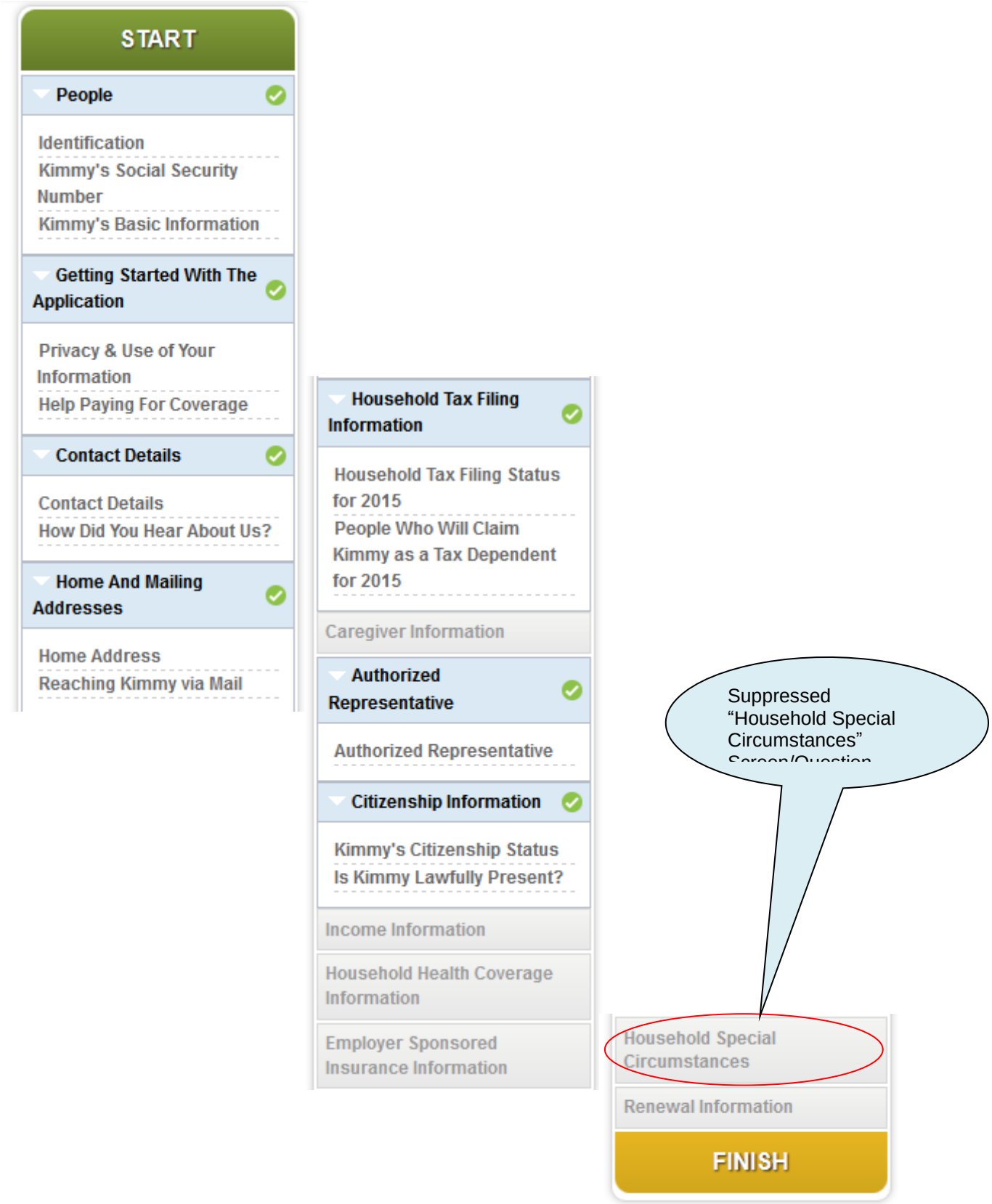


Figure 4 - Revised Application Flow (highlighting the impacted screen/question)



2.3. Employer Sponsored Coverage Flow – CMS Question 2

Employer Health Coverage: Do the questions related to access to employer sponsored coverage and special enrollment periods only show up for applicants with attested household incomes above applicable Medicaid and CHIP MAGI limits?

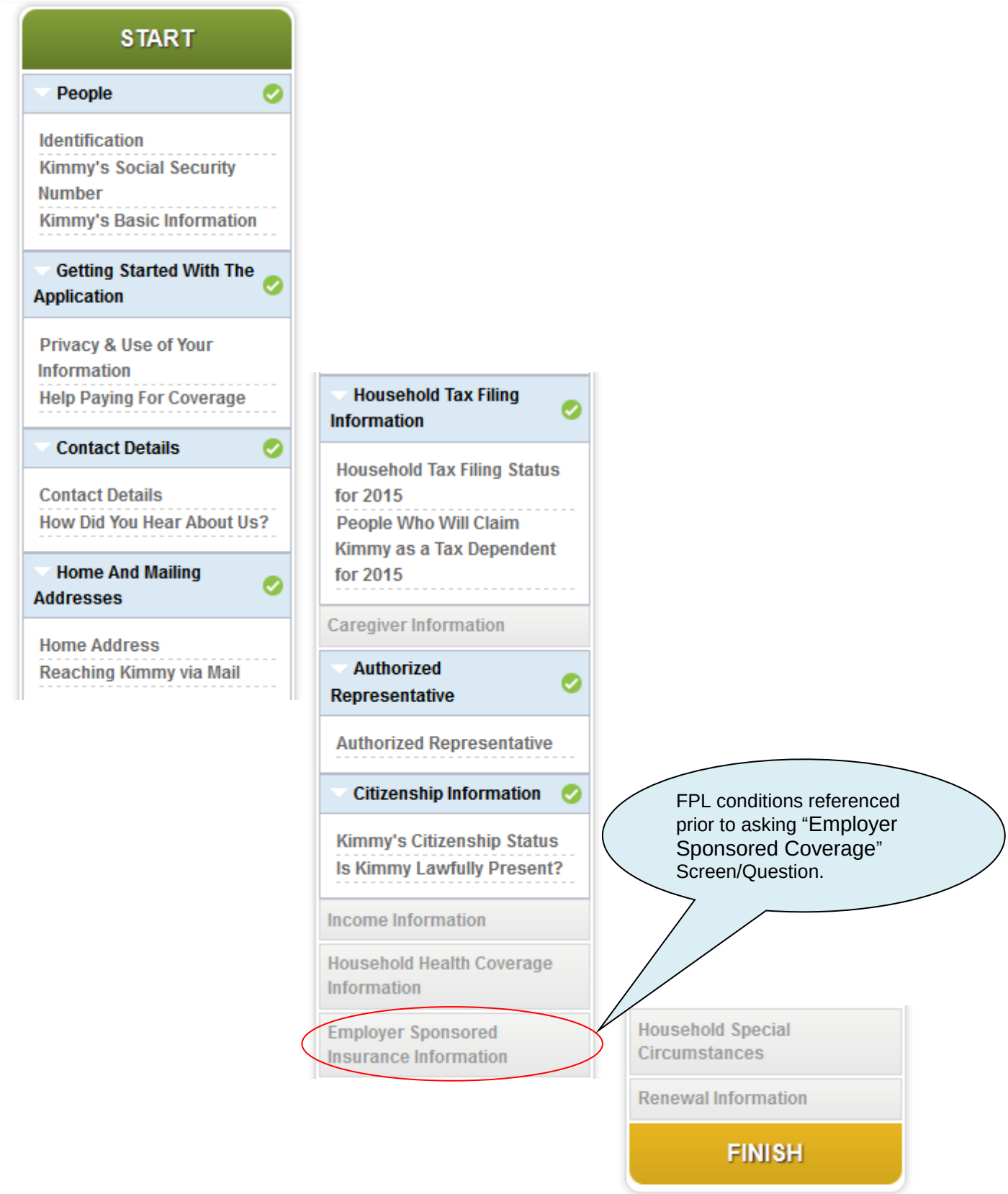
State as of October 1st, 2013: The employer sponsored coverage questions appear for households with household members who are potentially eligible for APTC or potentially eligible for Medicaid under Title XXI (CHIP) to check for potential minimum essential coverage.

Revised per CMS recommendation (March 22nd , 2013): DHS validated that the employer sponsored coverage questions only appear for applicants with household members who are potentially eligible for APTC or potentially eligible for Medicaid under Title XXI (CHIP) to check for potential minimum essential coverage.

If any household member meets eligibility criteria including residency, tax dependency status, and has a household income above the FPL associated with his or her respective program the ESI question will be asked.

Please refer to Figures 5 which depicts the list of questions of questions that are currently asked. Updates that have been made are highlighted in the summary bar.

Figure 5 - Revised Application Flow (highlighting the impacted screen/question)



OneGate for Integrated Eligibility

Individuals and Families – Portal Experience User Guide

Release 3.3

Table of Contents

1 Overview

1.1 Document Overview

This document is intended to provide an overview of the OneGate for Health Insurance Exchanges Portal Experience for Individuals and Families. The Portal Experience is divided into eight main sections, outlined below.

- The Anonymous Features section details the Screening tool, which allows the Customer to enter data anonymously to see if they are likely to qualify for programs such as Premium Assistance or Medicaid, and view available health plans.
- The Application, Plan Selection, and Plan Enrollment sections include a walkthrough of an example case scenario, where the Customer and their family apply for and enroll in Medicaid.

The purpose of this document is to provide standards and practices for caseworkers and assisters to follow to help guide Users to a high-quality and timely experience while navigating the OneGate portal. Accordingly, note that the assumed audience for this document is all stakeholders that will be trained to support Customers.

1.2 Glossary of Terms

User	A person (Assister, Broker, Navigator) guiding the Customer through the interview, or (in self-service) the Customers themselves
Customer	A person whose data is entered, reviewed, and edited by the User
Caseworker	A person who administers and reviews benefit eligibility and program enrollment

1.3 Use Case Description

- Application: 35-year-old female US citizen, earning $1,000 monthly

2 Anonymous Features

The following section provides an example of the User navigation through the Health Coverage Eligibility Screener and the anonymous Plan Browsing features.

The processes described below are not required to start an application, and no information from these anonymous features section is used to determine final eligibility, as all final eligibility determinations are processed through the application.

2.1 Health Coverage Eligibility Screener

The Health Coverage Eligibility Screener allows Users to enter minimal information about a household and returns an initial assessment of its eligibility for premium assistance tax credits or Medicaid benefits.

1. Click on **Individuals & Families**, and select **Find out now**.

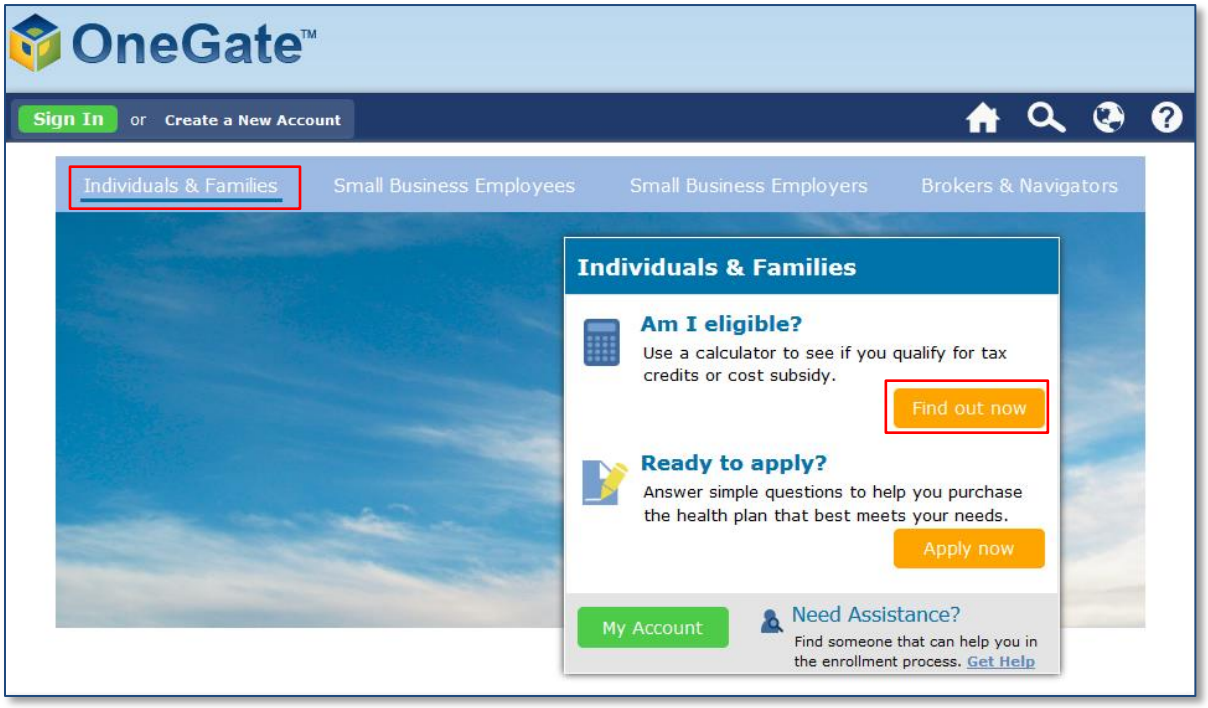


Figure 1: Home Page – Individuals & Families screen

2. Input household details. To add a household member, click **Add Another Person**. To remove a household member, click **Remove This Person**. Once all information has been entered, click **Calculate** to get an eligibility determination.

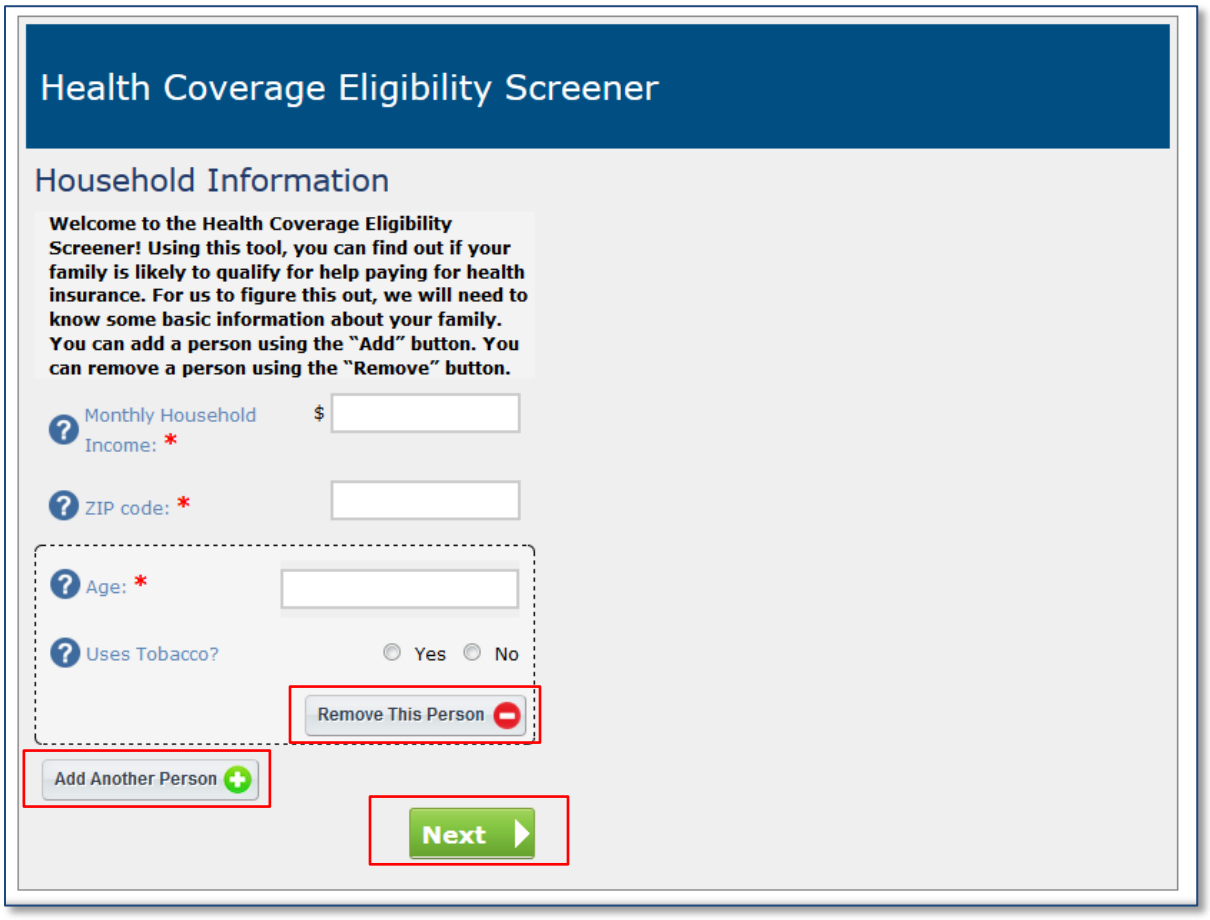


Figure 2: Premium Assistance Payment Calculator screen

3. Basic eligibility and tax credit calculation results are shown on the right. To immediately begin an application, click **Apply Now** and skip ahead to section **3 – Application** of this user guide. To browse available health plan options, click **View Plan Options**. To run a new eligibility determination, update the information under the Household Information section and click **Calculate Again**.

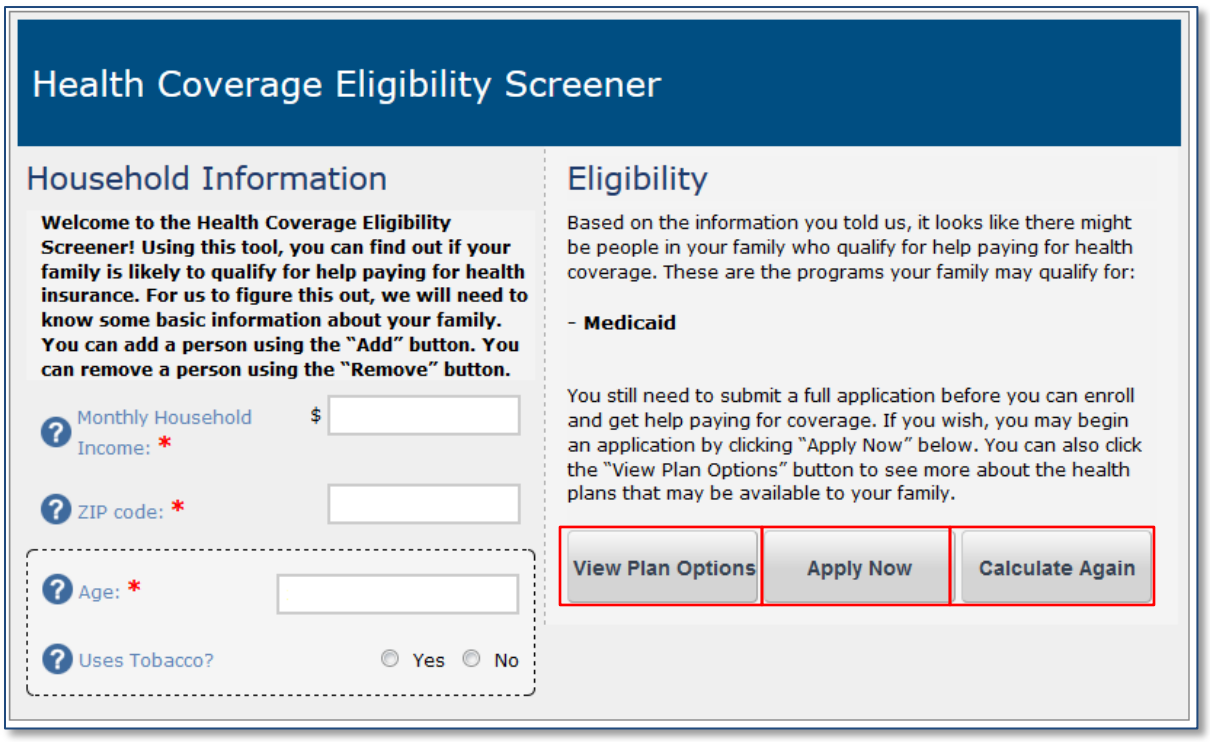


Figure 3: Premium Assistance Payment Calculator screen

2.2 Anonymous Plan Browsing

After completing the Premium Assistance Calculator, Users can browse plans that they may be eligible for in the Exchange, and estimate various associated costs and benefits.

1. Select the type of health plan to browse using the View buttons at the top of the screen.

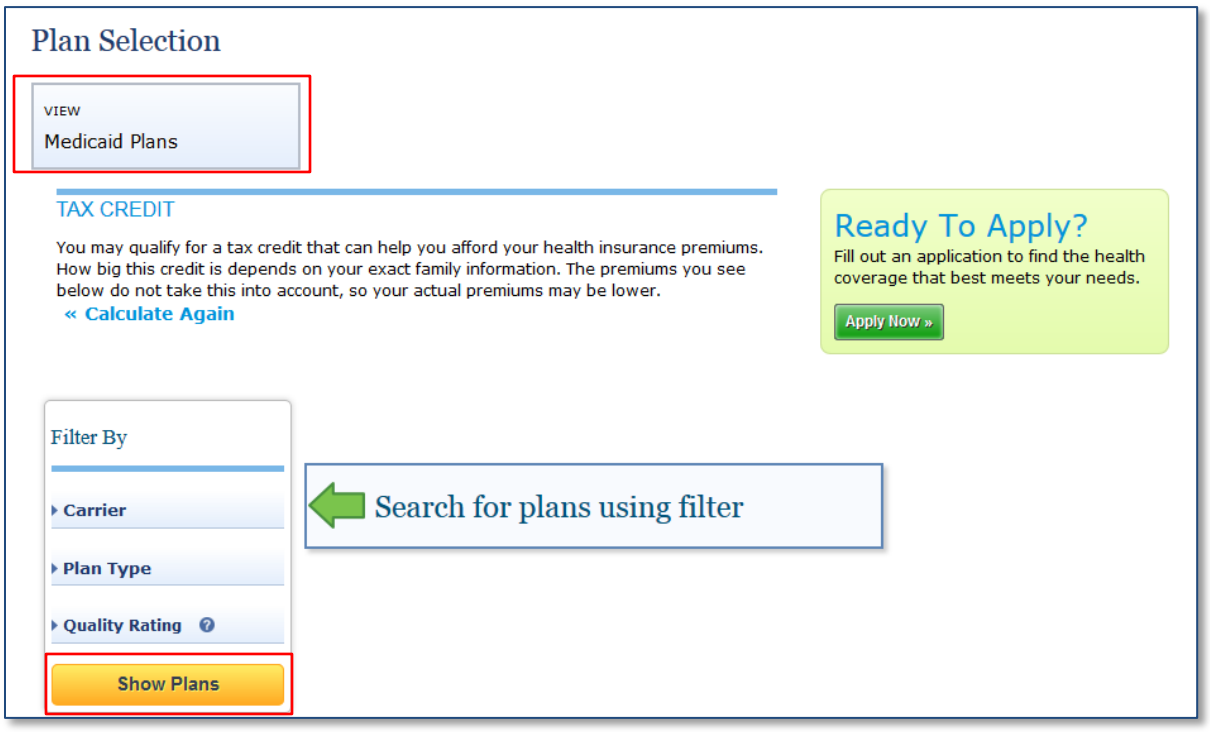


Figure 4: Anonymous Plan Selection screen

2. Enter filter criteria and click **Show Plans** to view all available plans.

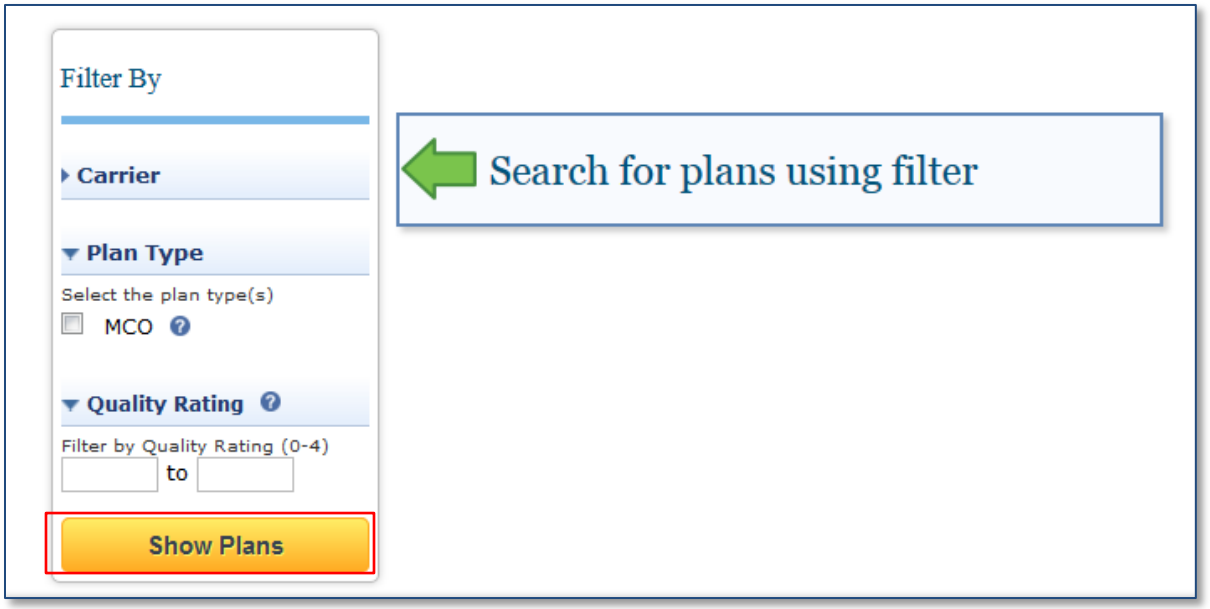


Figure 5: Plan Options Filter screenshot

3. Available plans are displayed as well as the estimated premium and final cost, based on the data entered. Users can view different plans or compare multiple plans by marking the checkboxes and clicking **Select and Compare**.

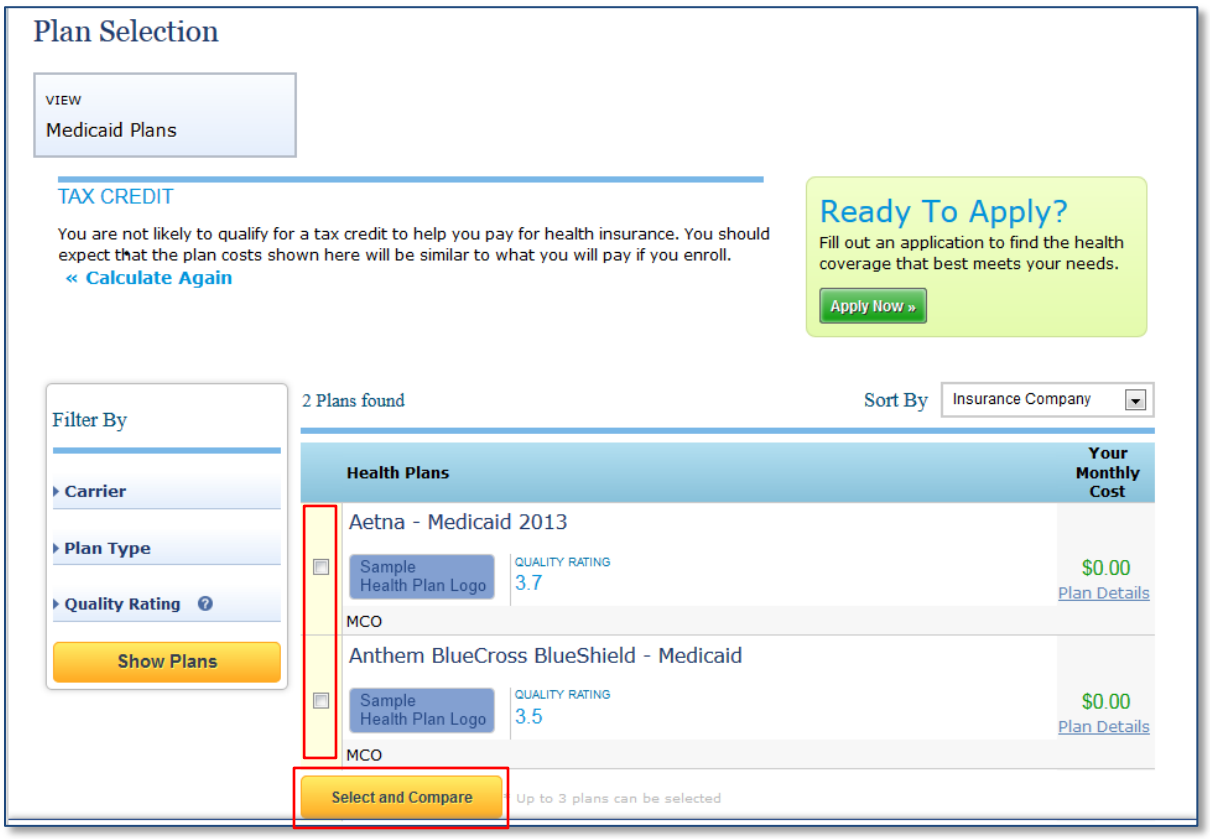


Figure 6: Anonymous Plan Selection screen

4. After browsing plans, to begin an application, click **Apply Now**.

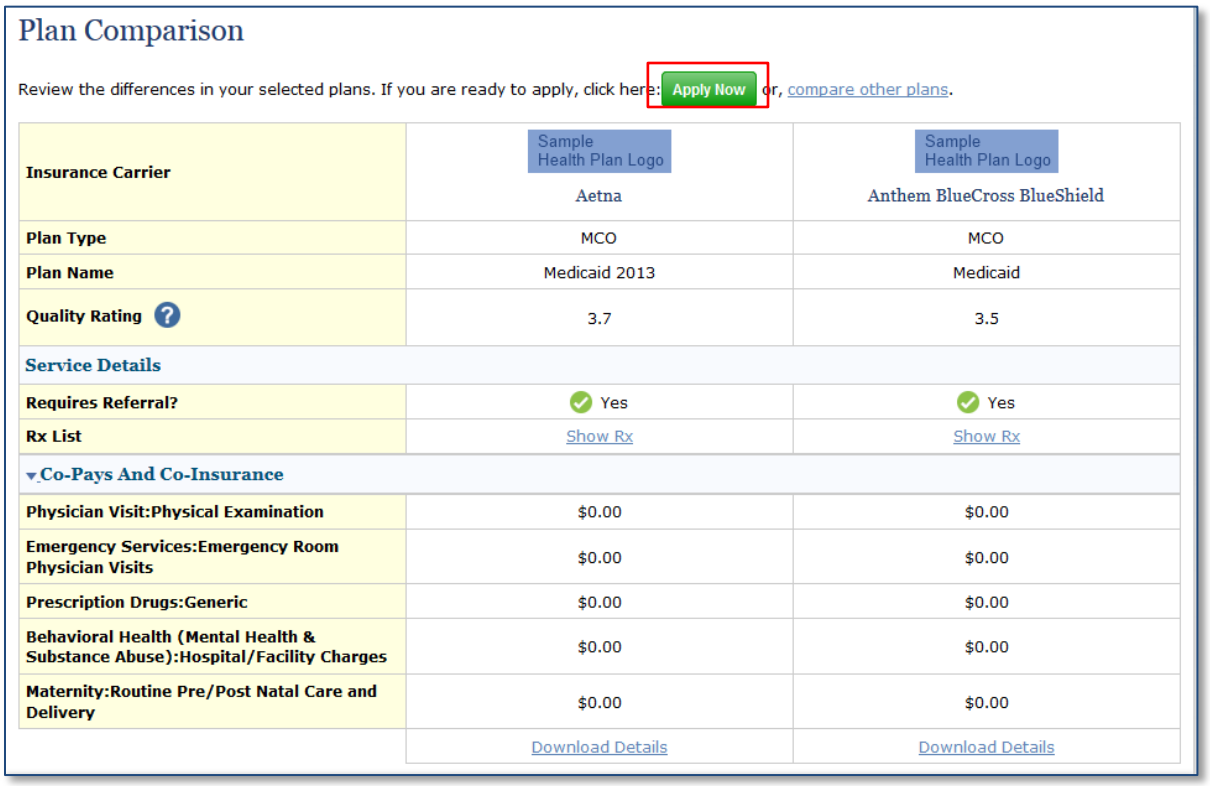


Figure 7: Anonymous Plan Comparison screen

3 Application

The following section provides an example of the User navigation through the Individuals & Families application process.

To initiate an application without going through the Anonymous Features described in the previous section, from the home page, click on **Individuals & Families**, and select **Apply Now**.

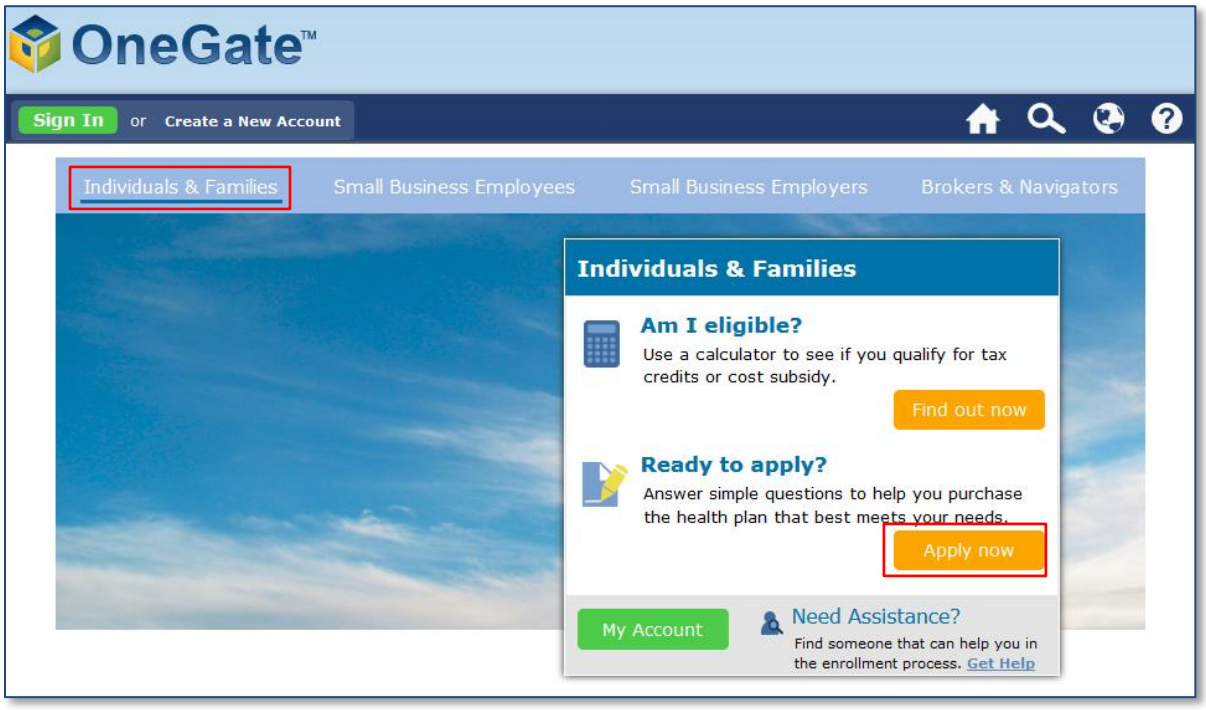


Figure 8: Home Page – Individuals & Families screen

3.1 User Registration

OneGate Users are required to create a User account before beginning an application or accessing any non-anonymous feature.

NOTE: Users that have already registered can sign in and continue on to section **4.2 – Application**. For users that have not yet registered, refer to the steps below.

1. From the Sign In screen, select **Register Now**.

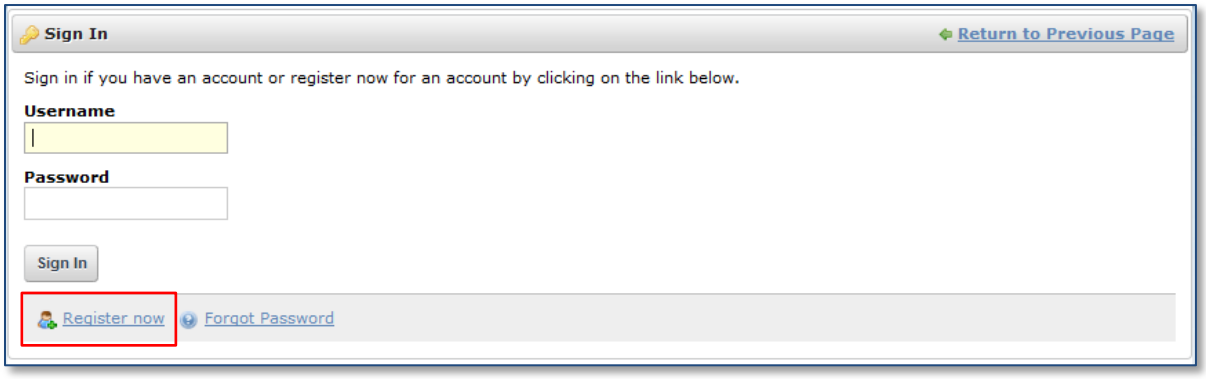


Figure 9: Sign In screen

2. Create login credentials on the Create Account screen. Select the "Individual" **User Type**, and click **Create**.

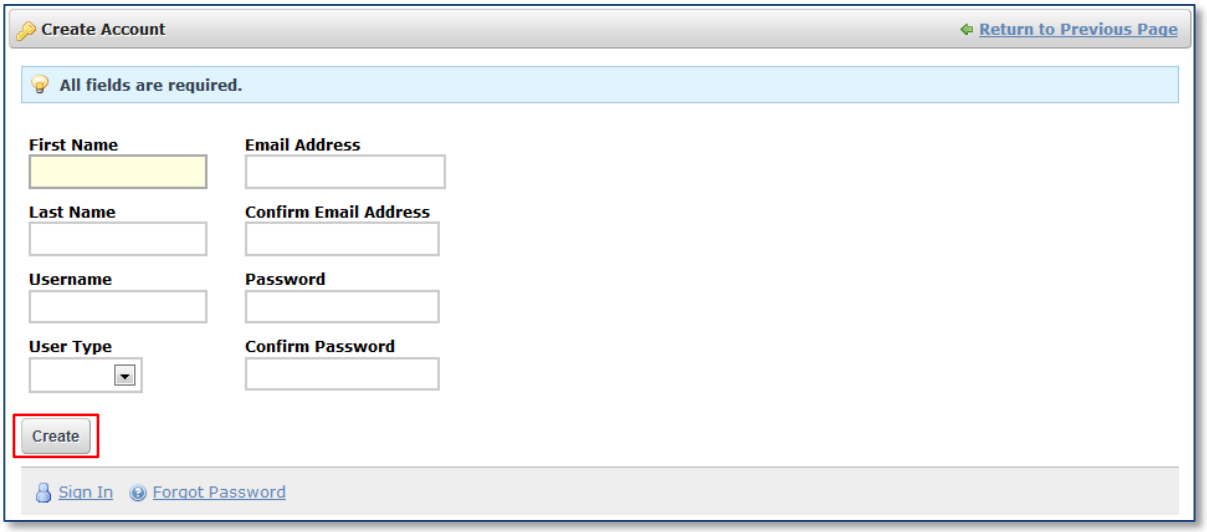


Figure 10: Create Account screen

3. Select a password reminder question, enter an answer, and click **Save**.

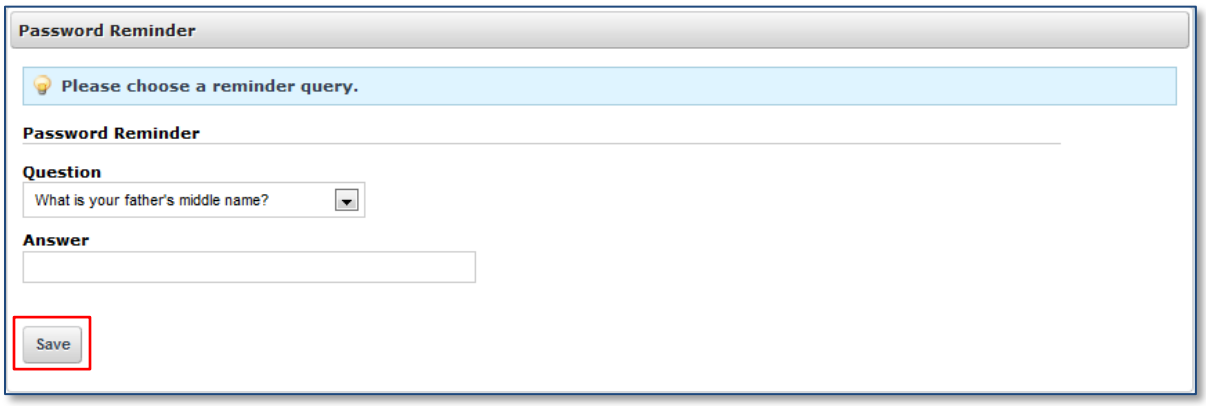


Figure 11: Password Reminder screen

3.2 Application

The Application process enables Users to apply for health plans. From all screens in the Application process, the **Print**, **Restart**, **Exit**, and **Save And Exit** buttons, as well as a breadcrumb on the right side of the screen are available to aid the User.

The questions asked vary depending on the use case, as well as on any state-specific rulebase changes. The screens below show the questions that appear for a single female 35-year-old applicant with $1000/month in income.

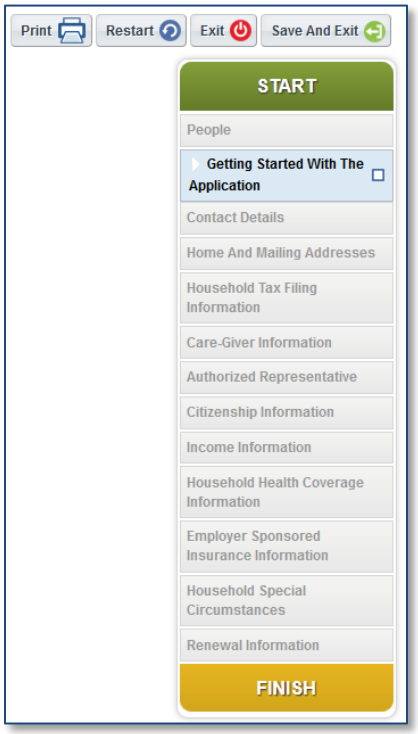


Figure 12: Application – Navigation Aids screenshot

1. Review the introductory information and click **Next**.

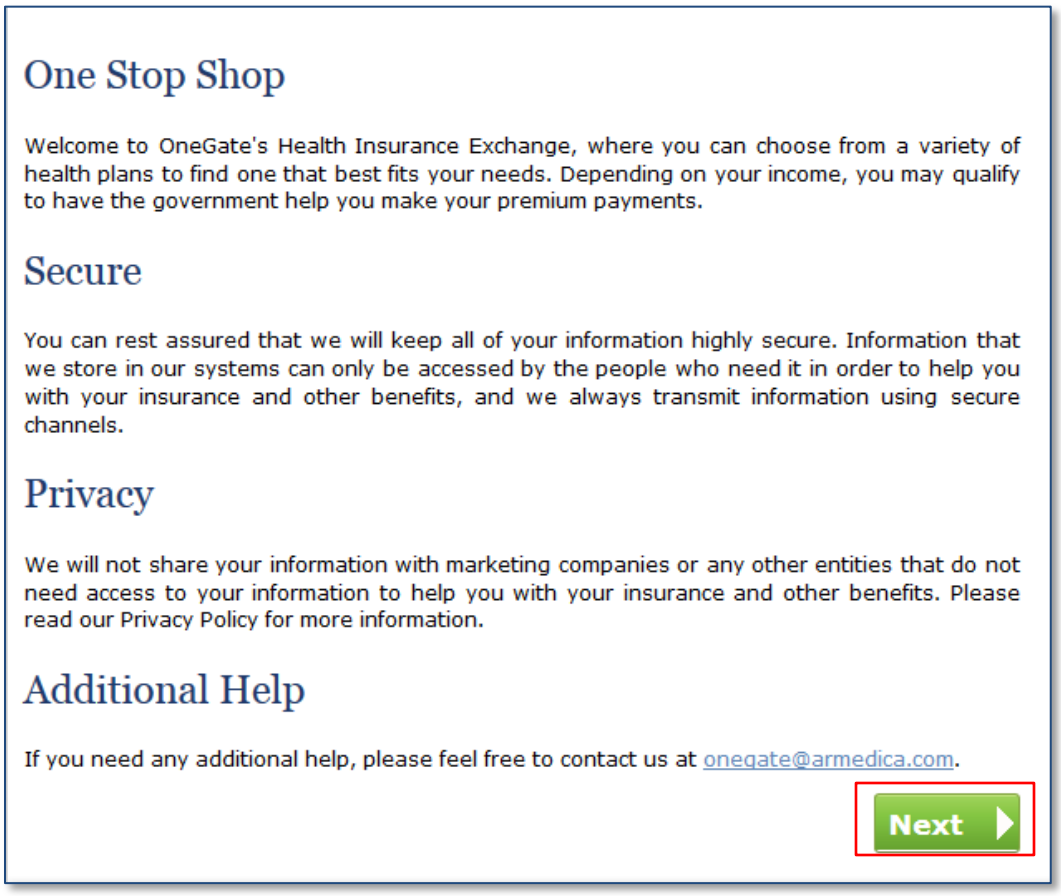


Figure 13: Application – One Stop Shop screen

1. Review the privacy information and click **Yes** to agree, then click **Next** to continue.

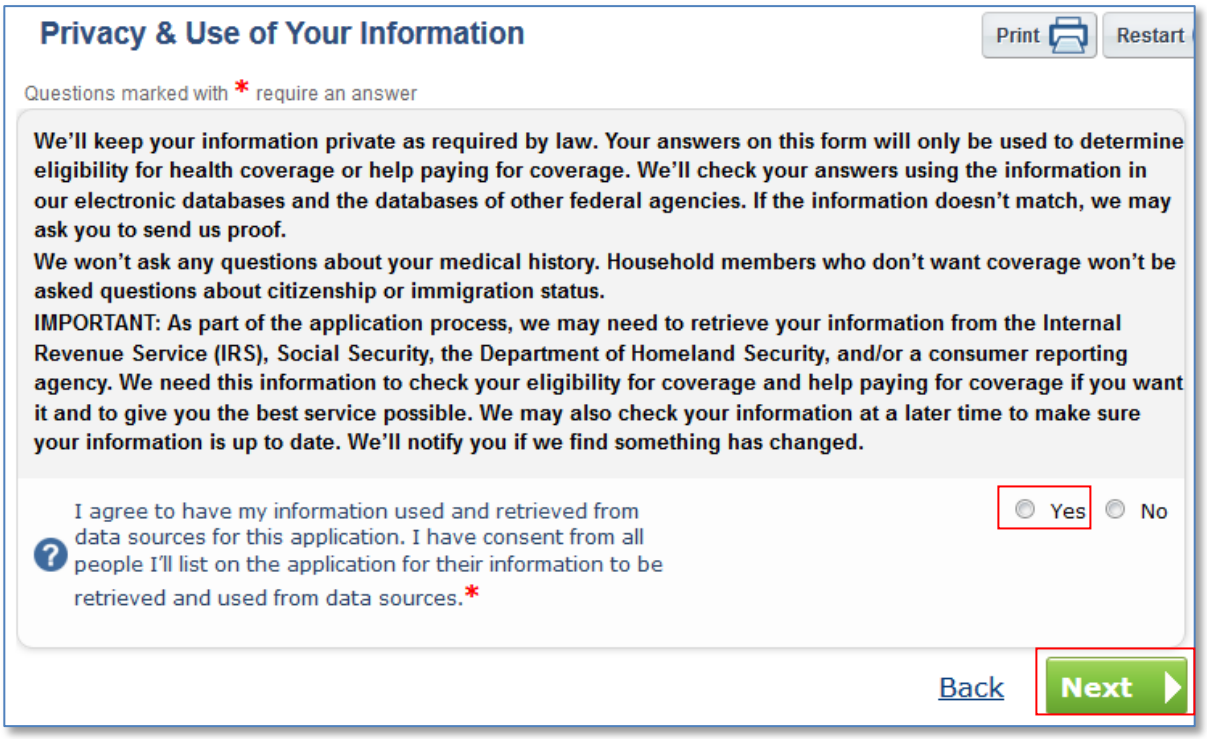


Figure 14: Application - Privacy Screen

2. Click **Yes** to apply for programs that may help pay for coverage.

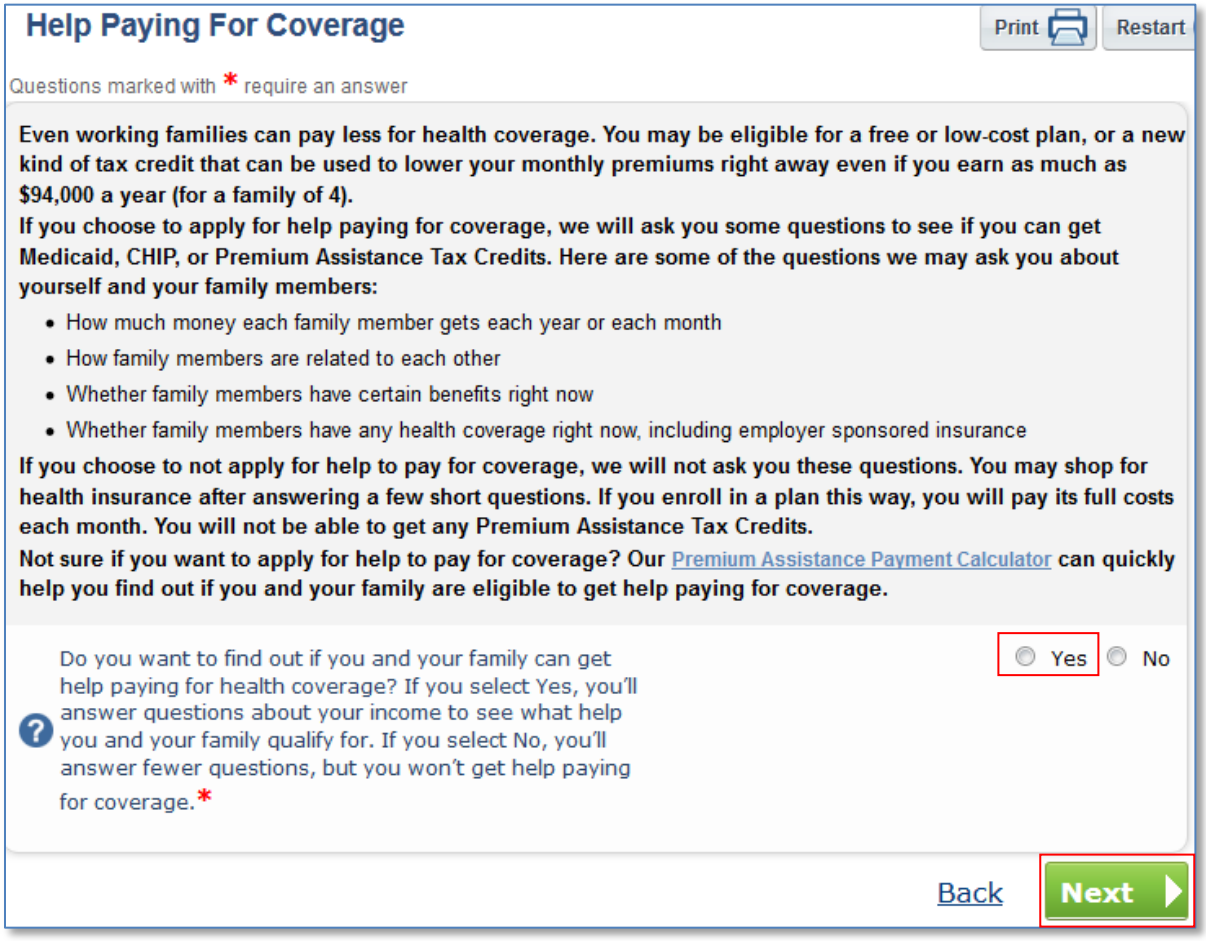


Figure 15: Application -Help Paying for Coverage

3. On the **Identification** screen, submit identifying information about the Customer's household members. Click **Add** or **Remove** to add or remove a household member. Click **Next** to continue.

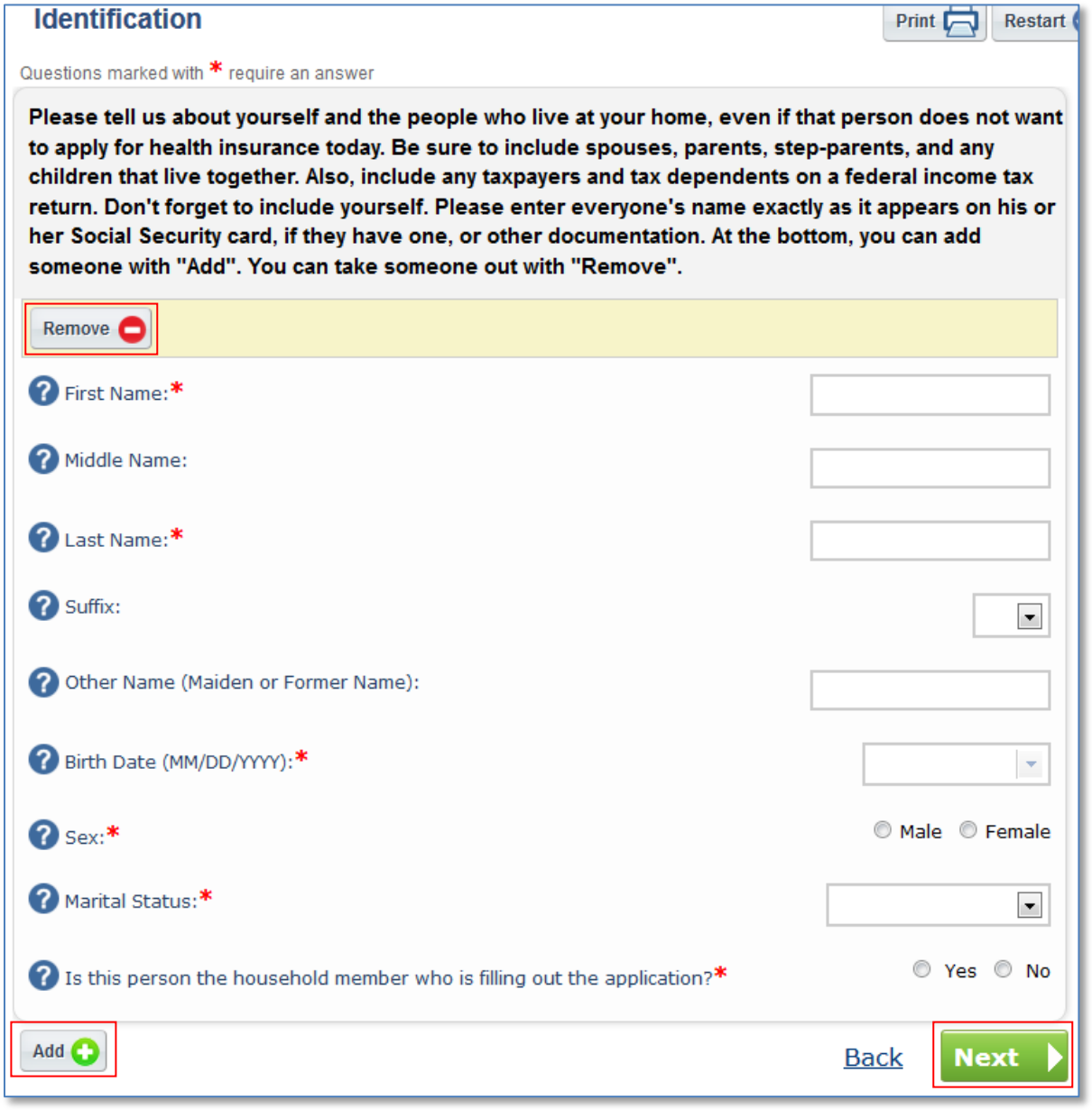


Figure 16: Application - Identification Screen

4. Enter the preferred method of contact and any additional contact information, then click **Next**.

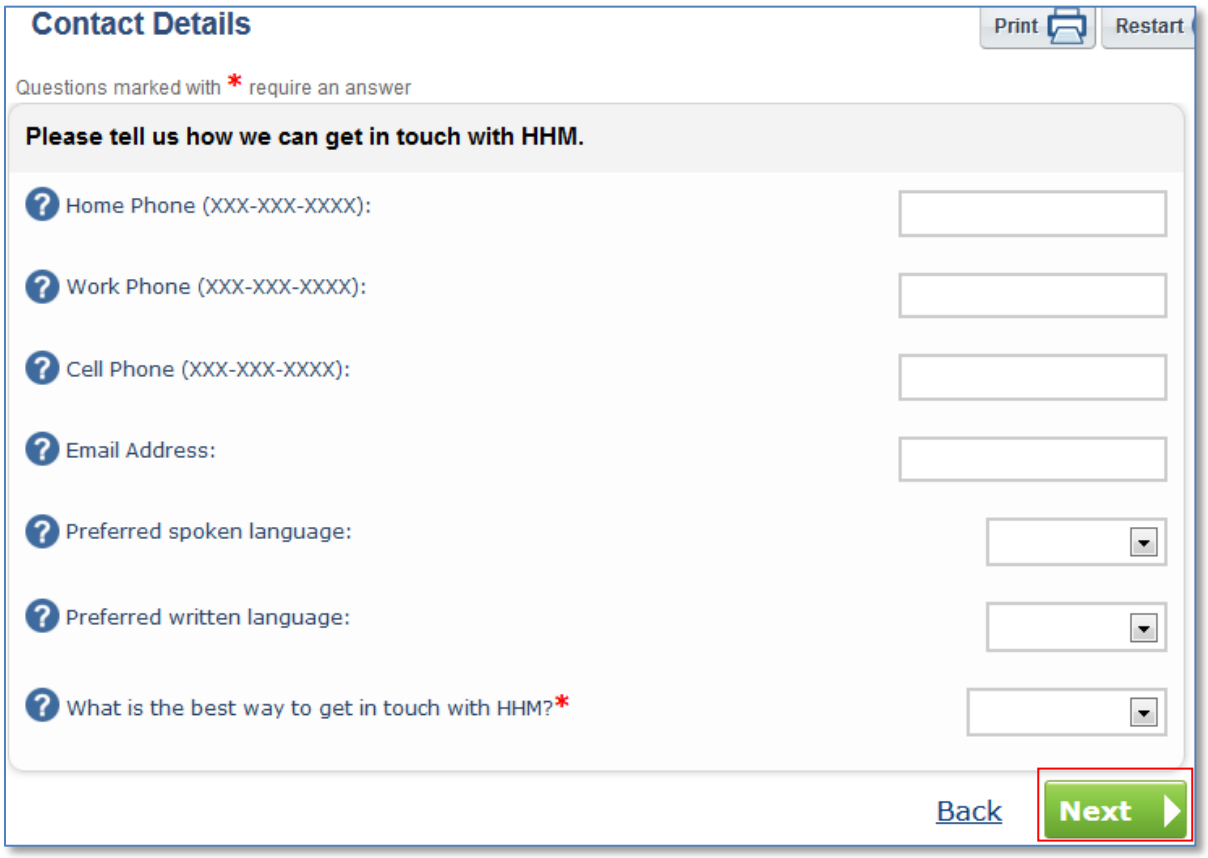


Figure 17: Application - Contact Details Screen

5. Enter the home addresses of all the household members, then click **Next.**

Figure 18: Application - Home Address Screen

6. Confirm that the home address is the same as the mailing address then click **Next**.

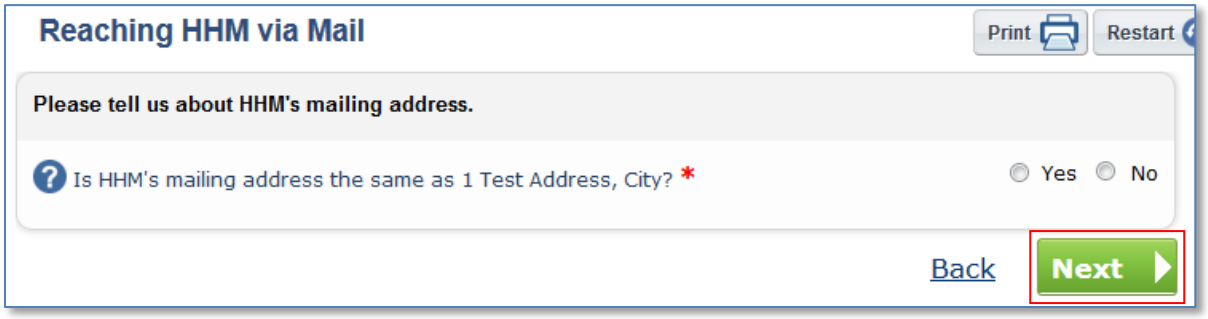


Figure 19: Application - Mailing Address Screen

7. Select **Yes** if a household member (HHM) is going to file a federal income tax return then click **Next** to continue.

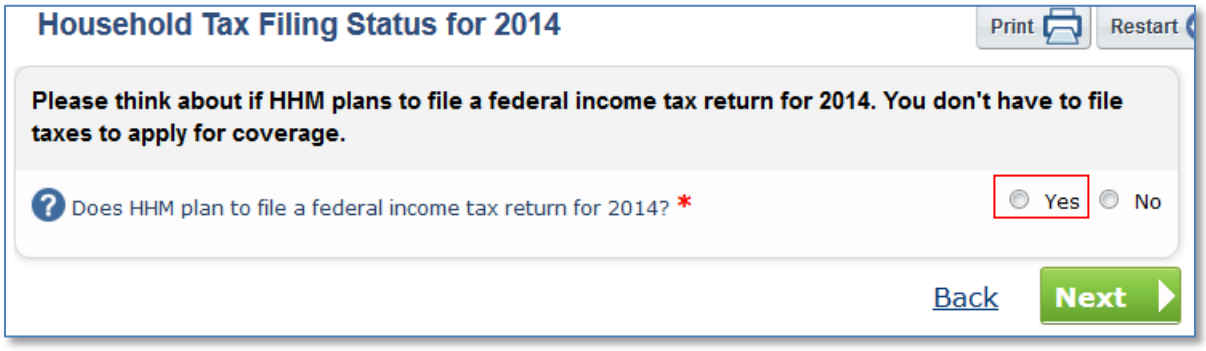


Figure 20: Application - Household Tax Filing Status Screen

8. In order to determine the tax filing household, necessary questions are asked, such as who the tax dependents are in the tax filing household.

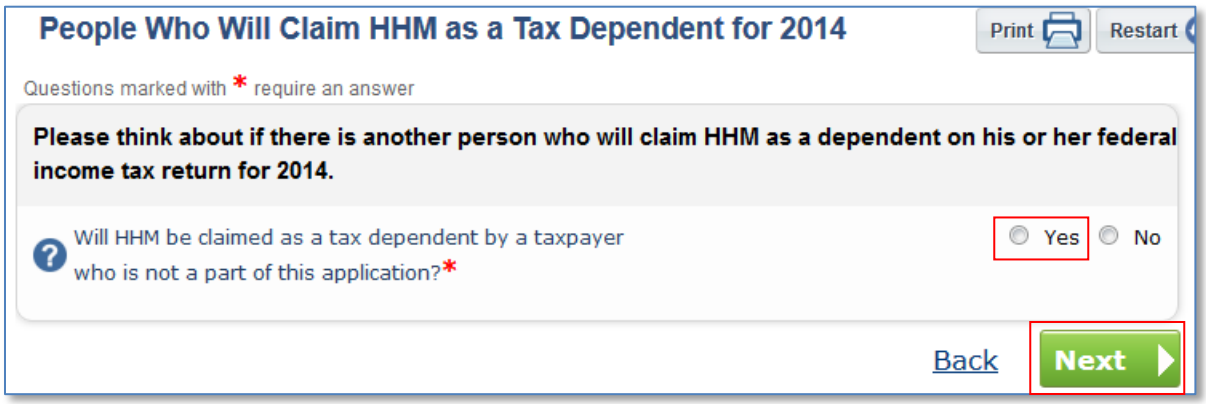


Figure 21: Application - Tax Dependent Screen

9. The applicant can choose to appoint an authorized representative. Afterwards, click **Next** to continue.

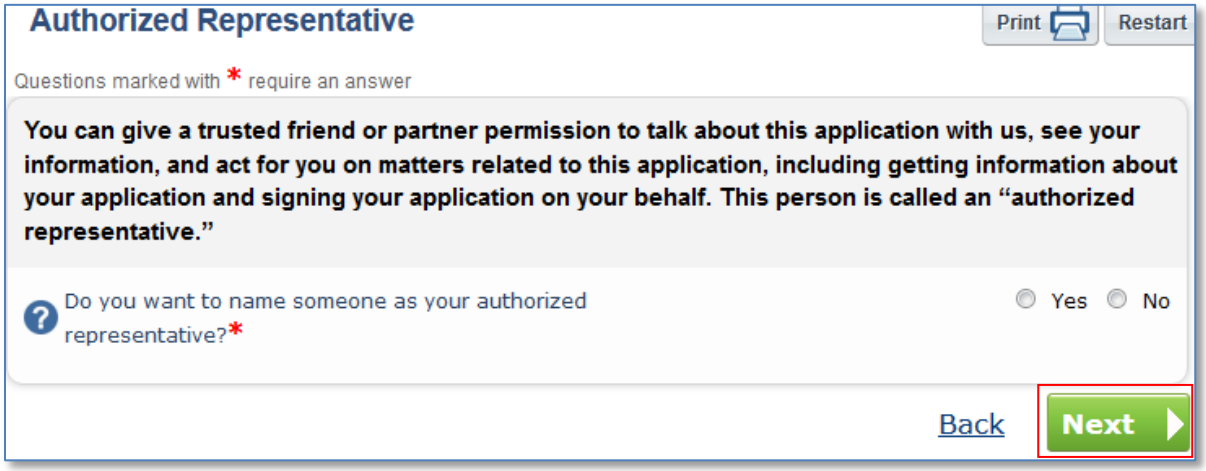


Figure 22: Application - Authorized Representative Screen

10. Applicant can enter a Social Security Number to facilitate verification (Optional). Click **Next** to continue.

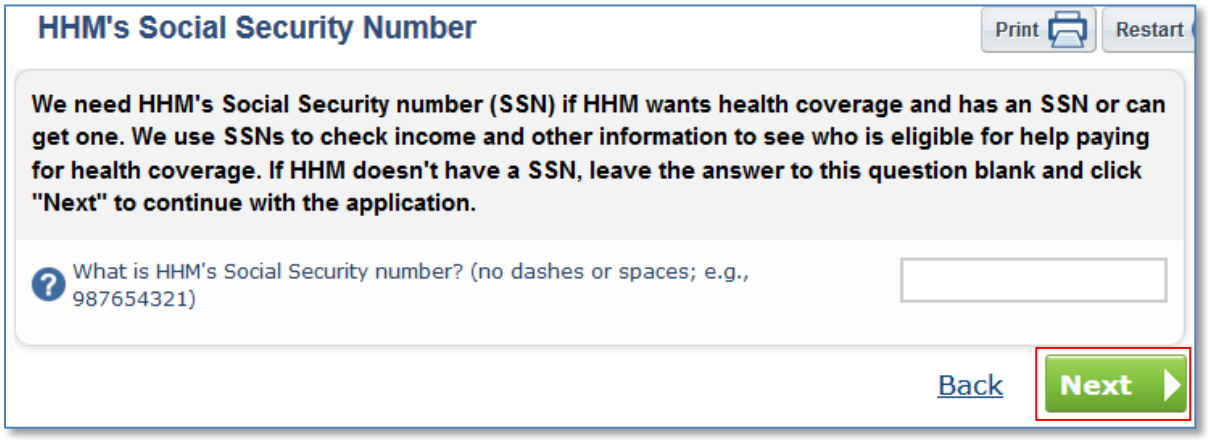


Figure 23: Application - Social Security Number Screen

11. Answer non-financial questions such as disability and Native American status. Click **Next** to continue.

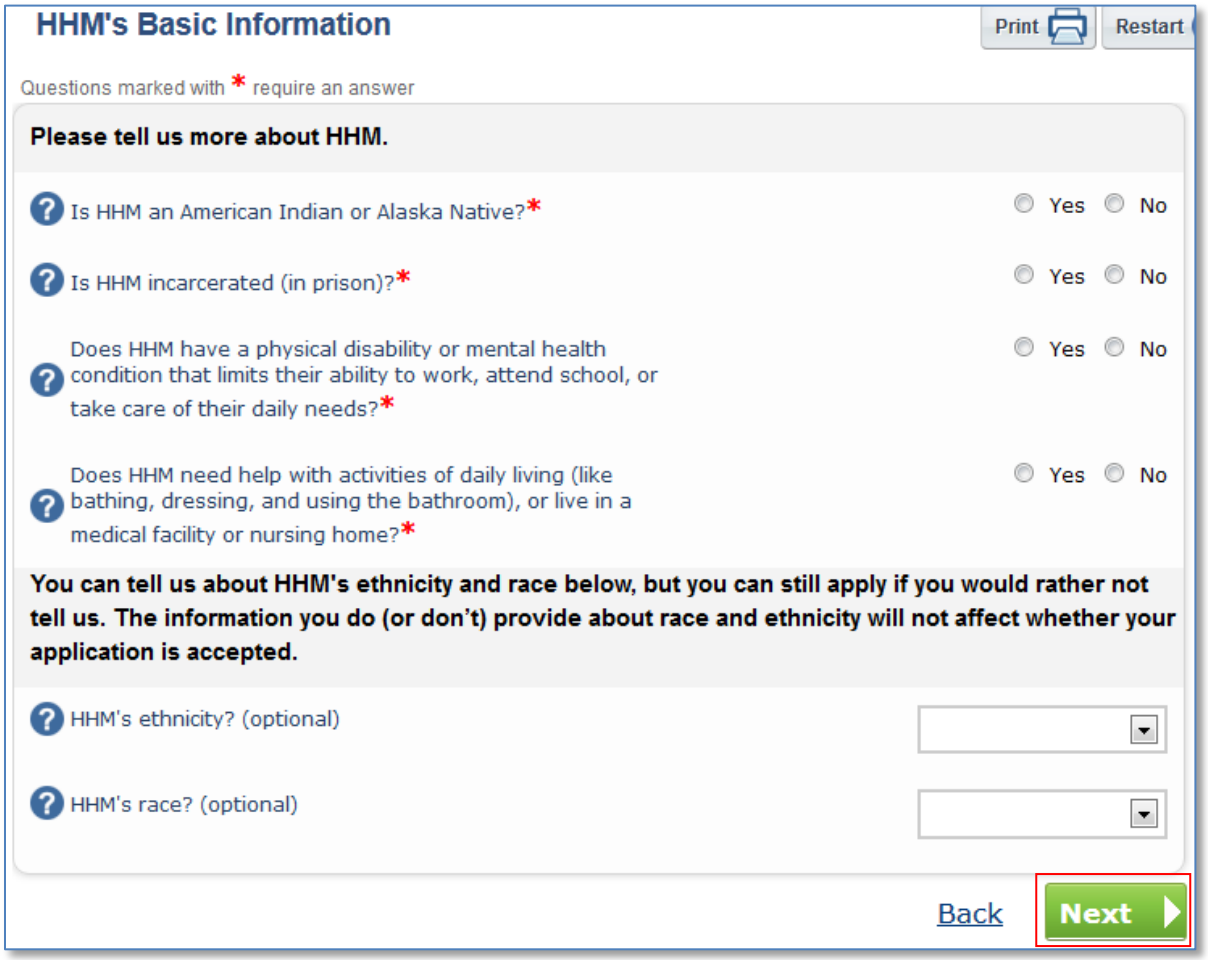


Figure 24: Application - Basic Information Screen

12. Answer a question about citizenship status. Click **Next** to continue.

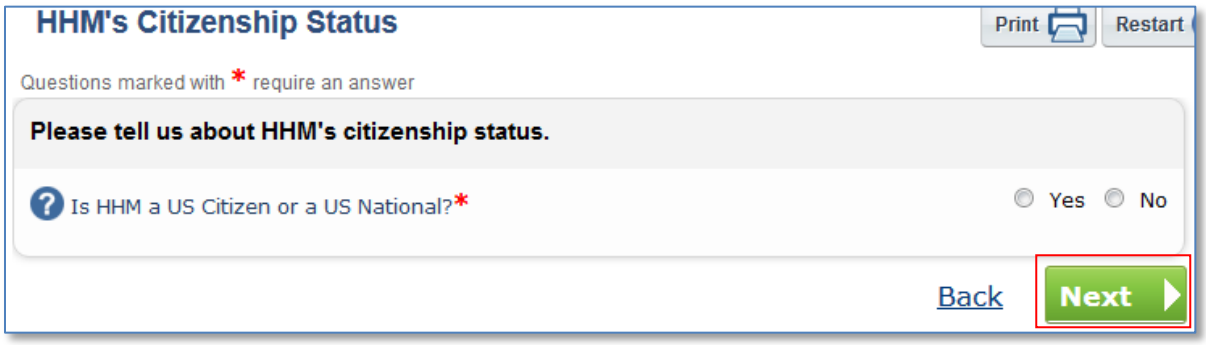


Figure 25: Application - Citizenship Status Screen

13. Provide additional details about HHM's citizenship status. Click **Next** to continue.

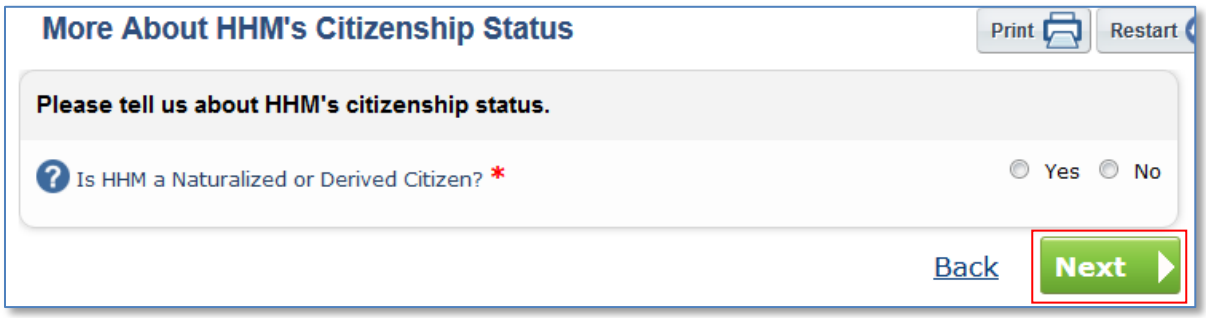


Figure 26: Application - More About Citizenship Status Screen

14. Click **Yes** to consent to the external verification process and click **Next** to continue.

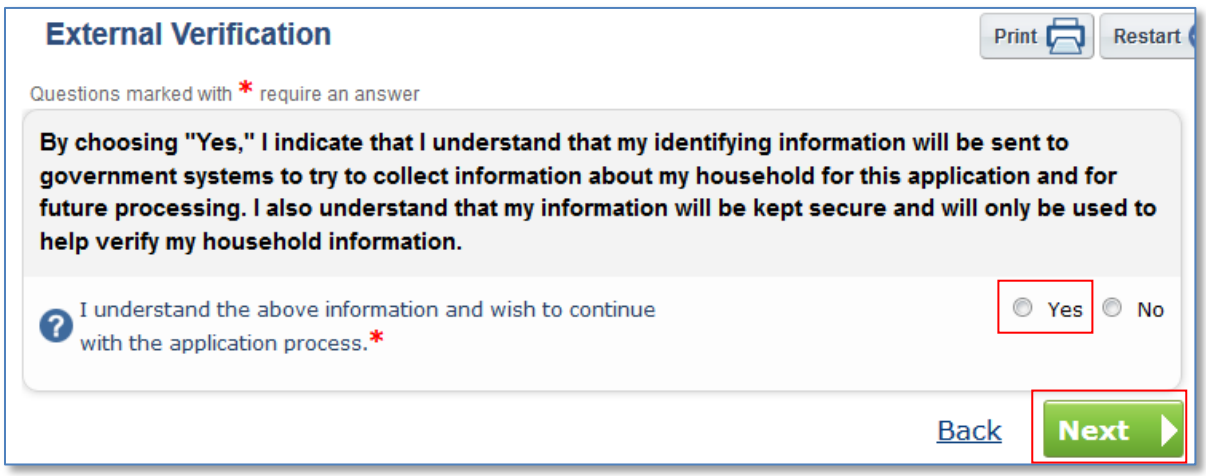


Figure 27: Application - External Verification Screen

15. Use the **Add** button to add an income source. Income sources should be reported for all HHMs. Use the **Remove** button to remove an income source. Click **Next** to continue.

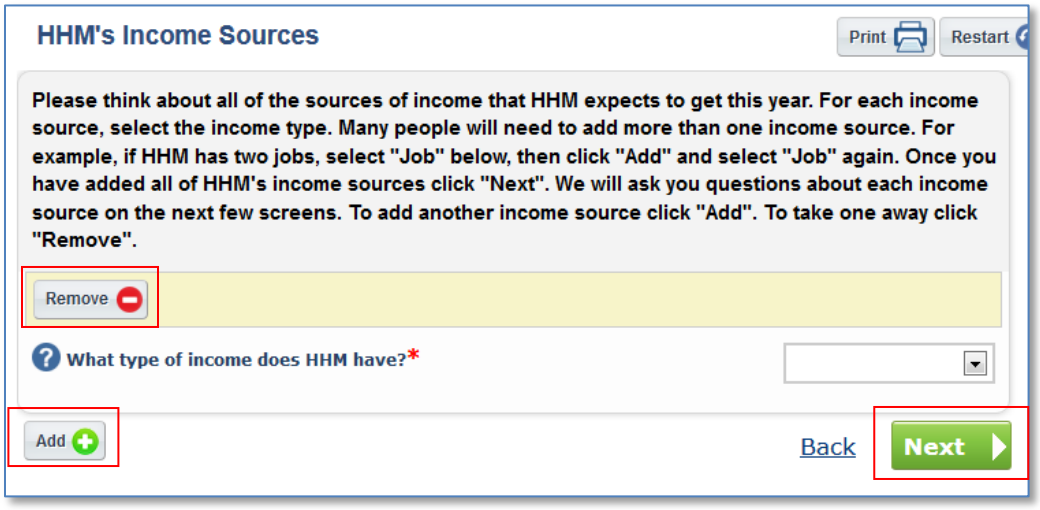


Figure 28: Application - Income Sources

16. Provide additional information about the HHM's job. Click **Next** to continue.

Figure 29: Application - Income Details

17. Report any deductions from HHM's income. Click **Next** to continue.

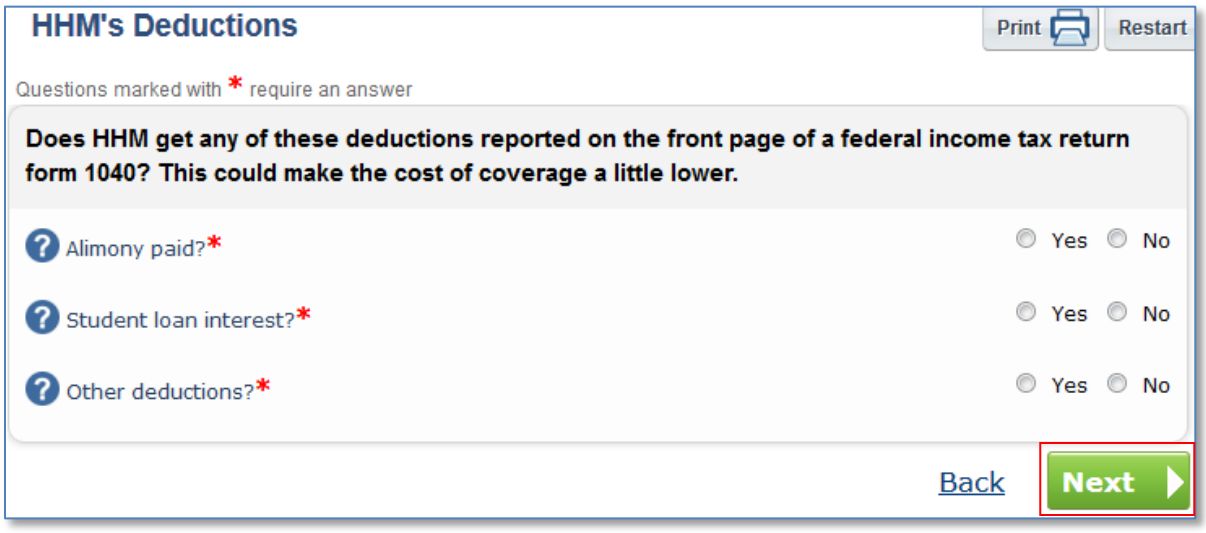


Figure 30: Application - Deductions

18. Click **Yes** to confirm the HHM's annual income. Click **Next** to continue.

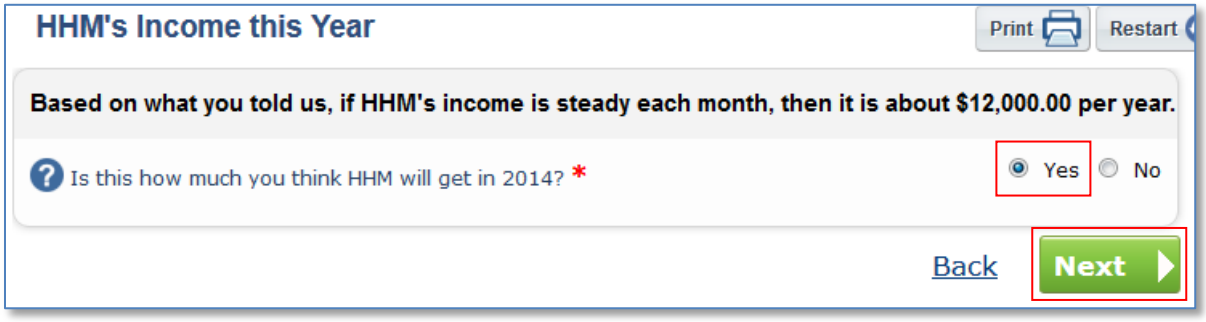


Figure 31: Application - Confirm Annual Income

19. The following questions are related to minimum essential coverage. Answer them and click **Next** to continue.

Figure 32: Application - Health Coverage

20. Use the **Add** button to add the employers of every HHM. Click **Next** to continue.

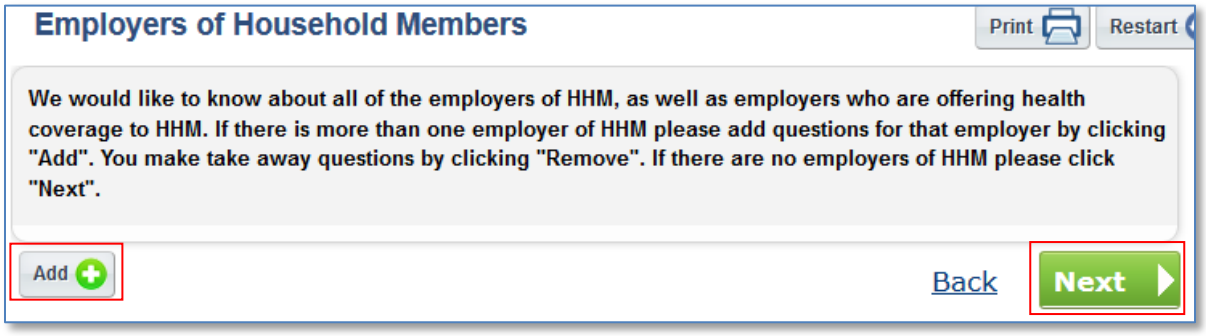


Figure 33: Application - Employers

21. The following questions are related to employers of people in the household. Answer them and click **Next** to continue.

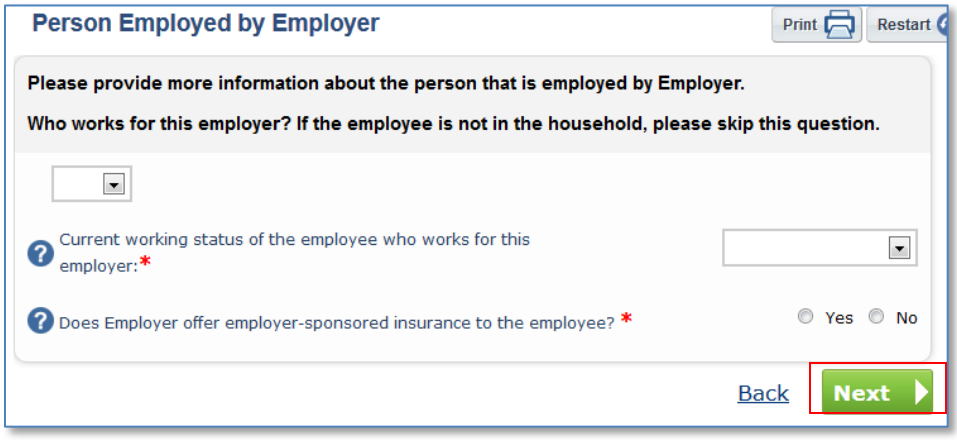


Figure 34: Application – Employer Details

22. Provide employer contact information and click **Next** to continue.

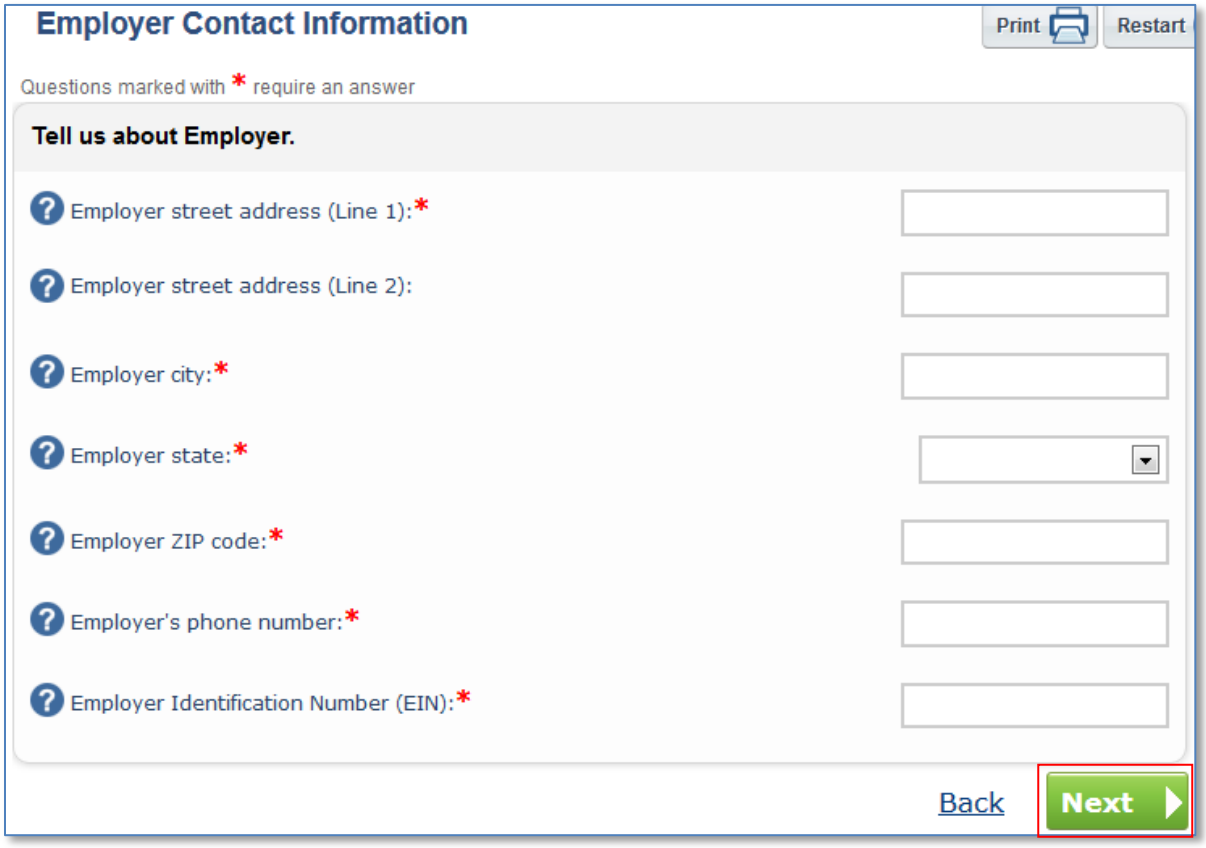


Figure 35: Application - Employer Contact Information

23. Report special events that may have occurred in the past 60 days. Click **Next** to continue.

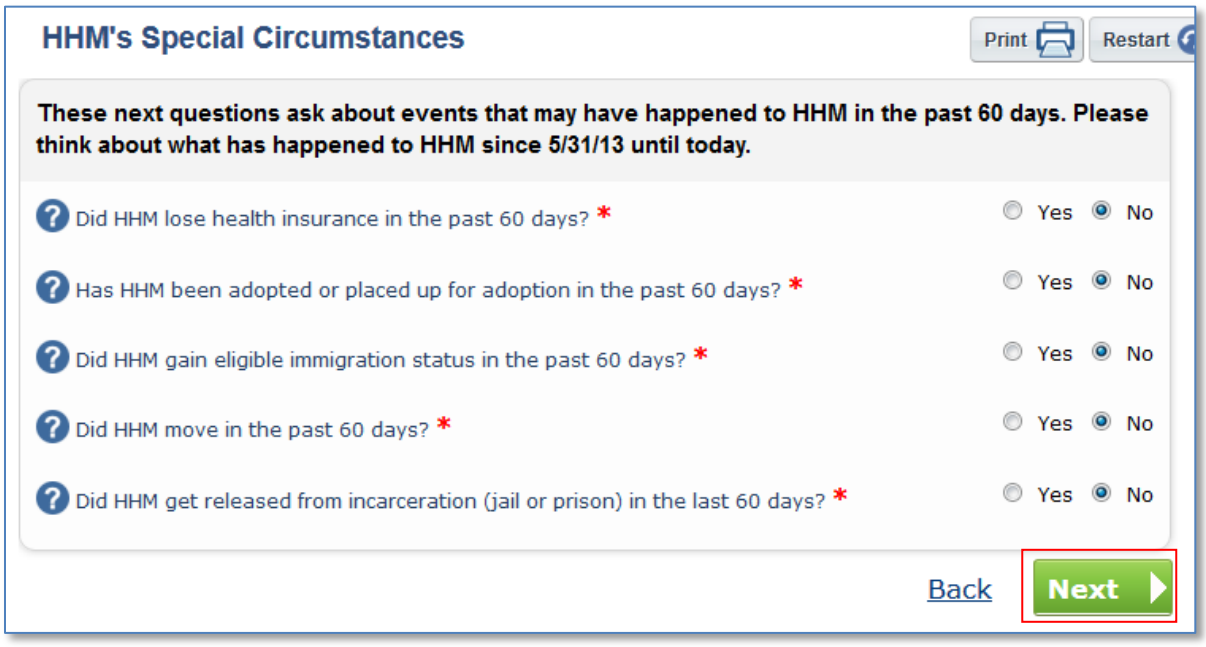


Figure 36: Application - Special Circumstances

24. Report tobacco usage. Click **Next** to continue.

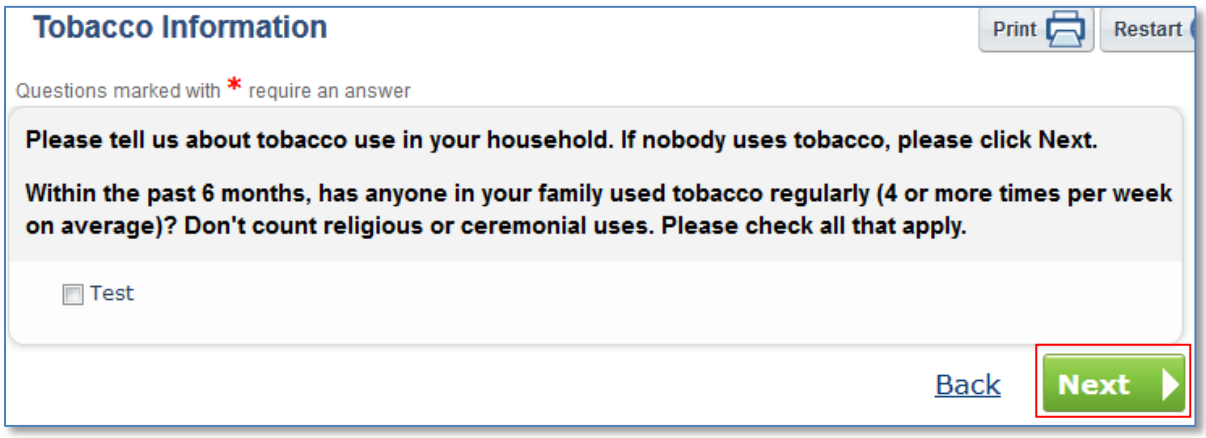


Figure 37: Application - Tobacco Information

25. Select how you heard about the exchange. Click **Next** to continue.

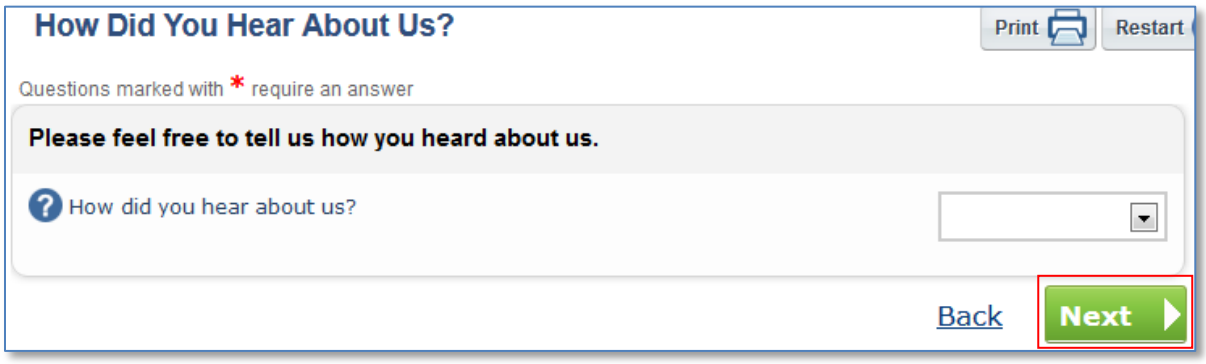


Figure 38: Application - How Did You Hear

26. Select a preference for automatic renewals. Click **Next** to continue.

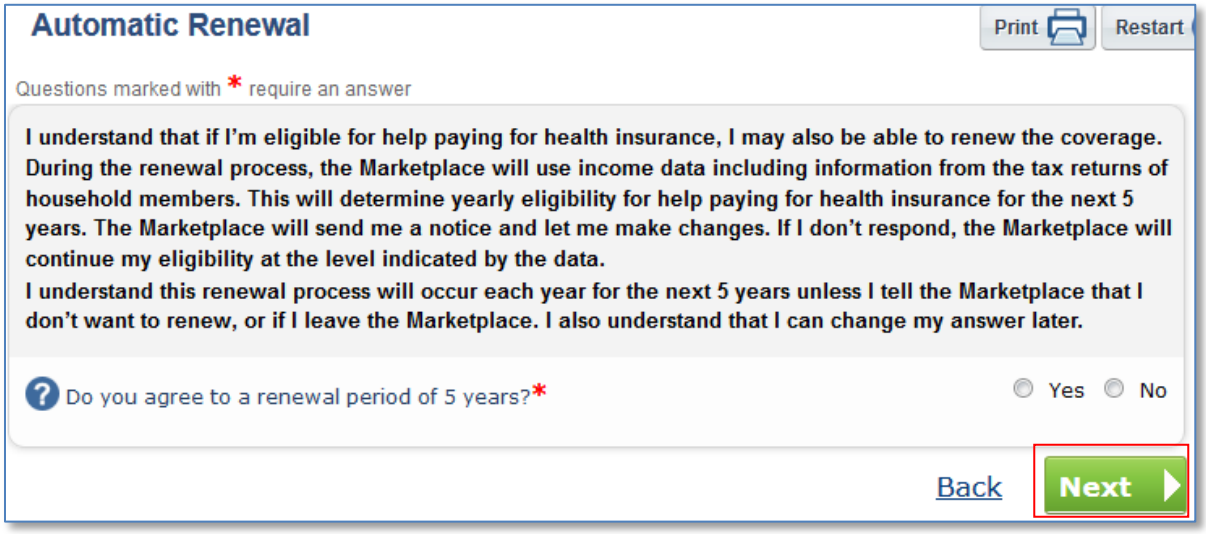


Figure 39: Application - Automatic Renewal

27. This is the data review screen. The applicant can verify the application or change the responses by clicking the **Edit** buttons to return to a screen in the application and edit information entered.

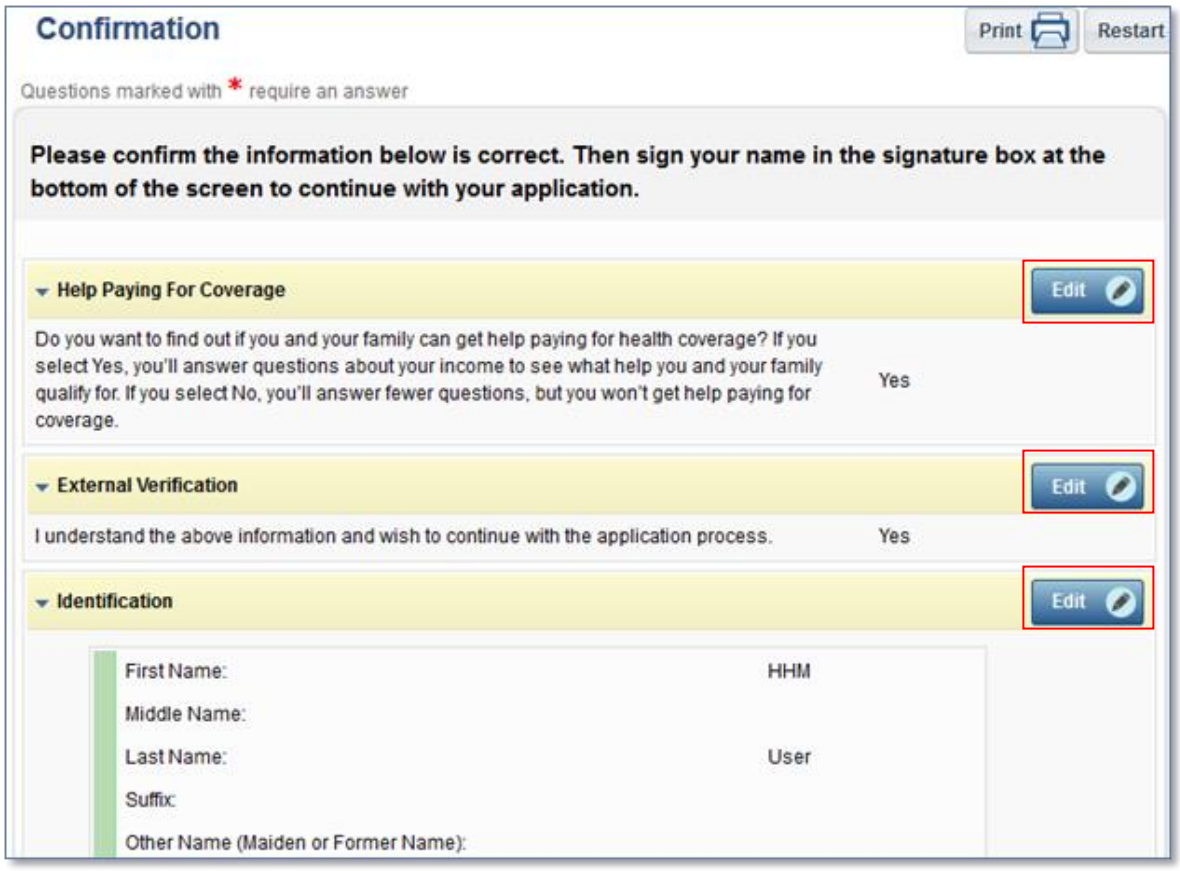


Figure 40: Application - Data Review Screen

28. To submit the application, click **Yes** to agree to the consent statements. Next, enter a signature, and click **Confirm** to submit the application for eligibility determination.

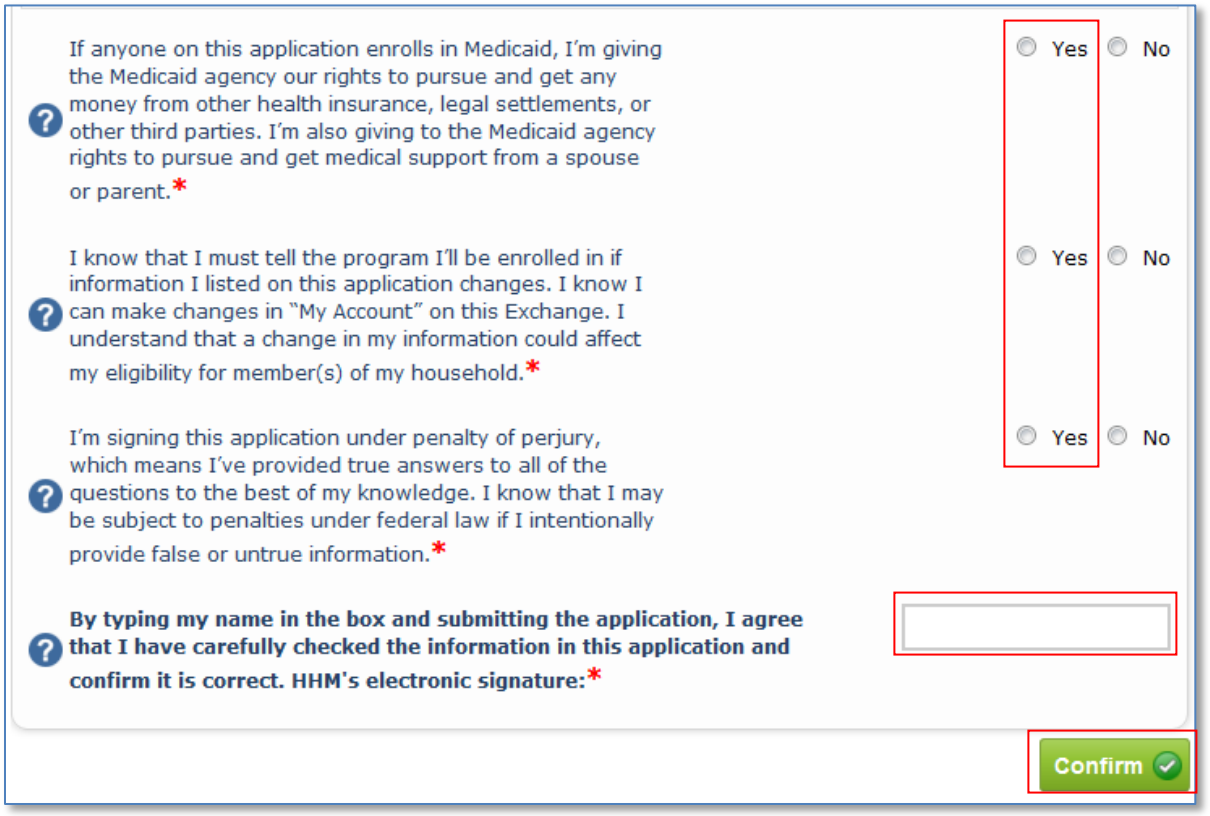


Figure 41: Application - Data Review Confirmation

29. The benefits summary screen provides the applicant with the results of the eligibility determination. Click on the **applicant's name** to view details of the eligiblity determination results for that program that the HHM is applying for.

    In this scenario, the applicant is temporarily approved for Medicaid and QHP enrollment. To continue, click **Select a Plan** and refer to **Section 4- Plan Selection and Enrollment.** Additionally, the applicant can also **Appeal** Not Eligible determinations.

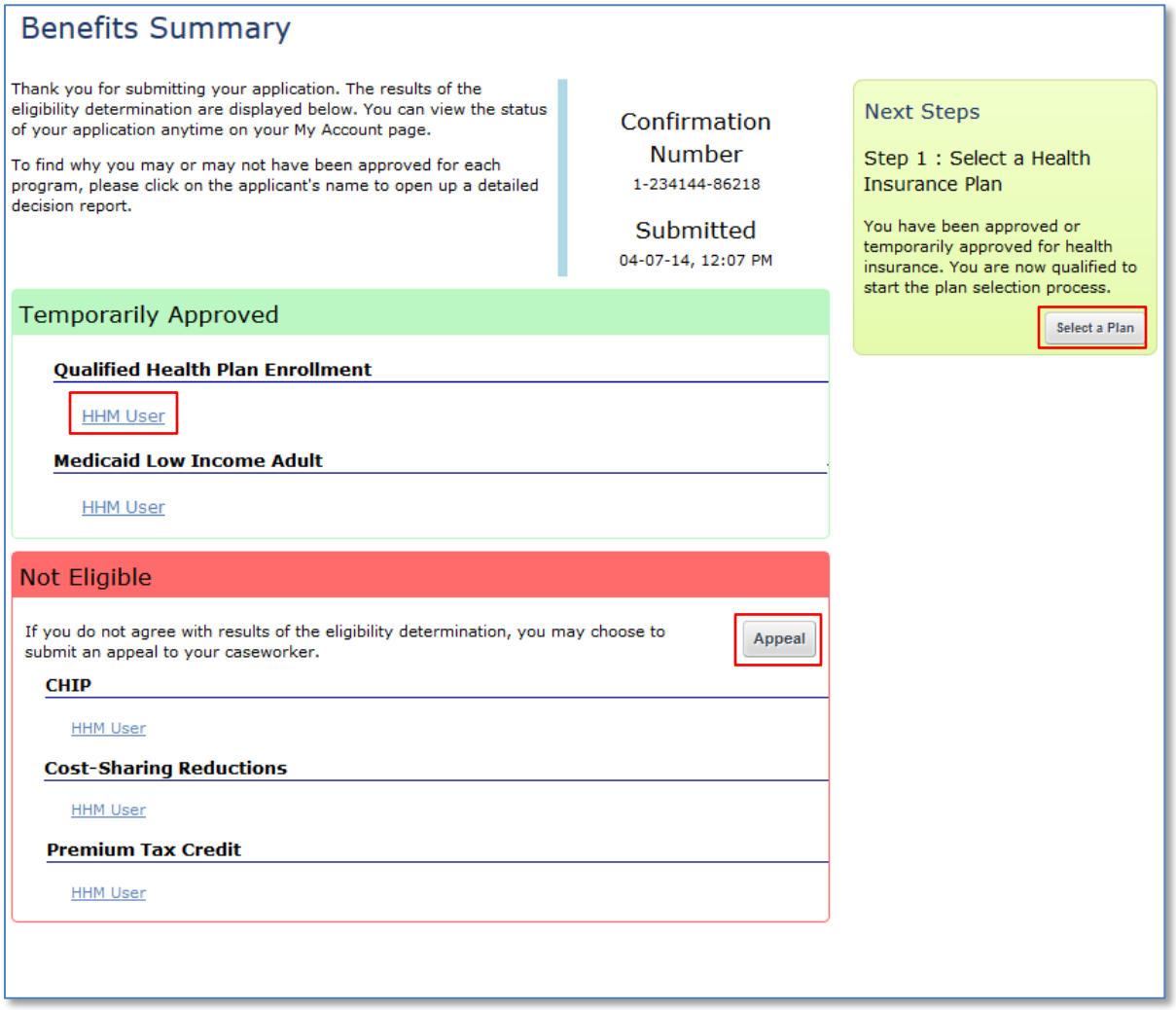


Figure 42: Application – Benefits Summary Screen

4 Plan Selection and Enrollment

The following section provides an example of the User navigation through the Individuals & Families plan selection and enrollment processes.

1. Review the introductory information and click **Next**.

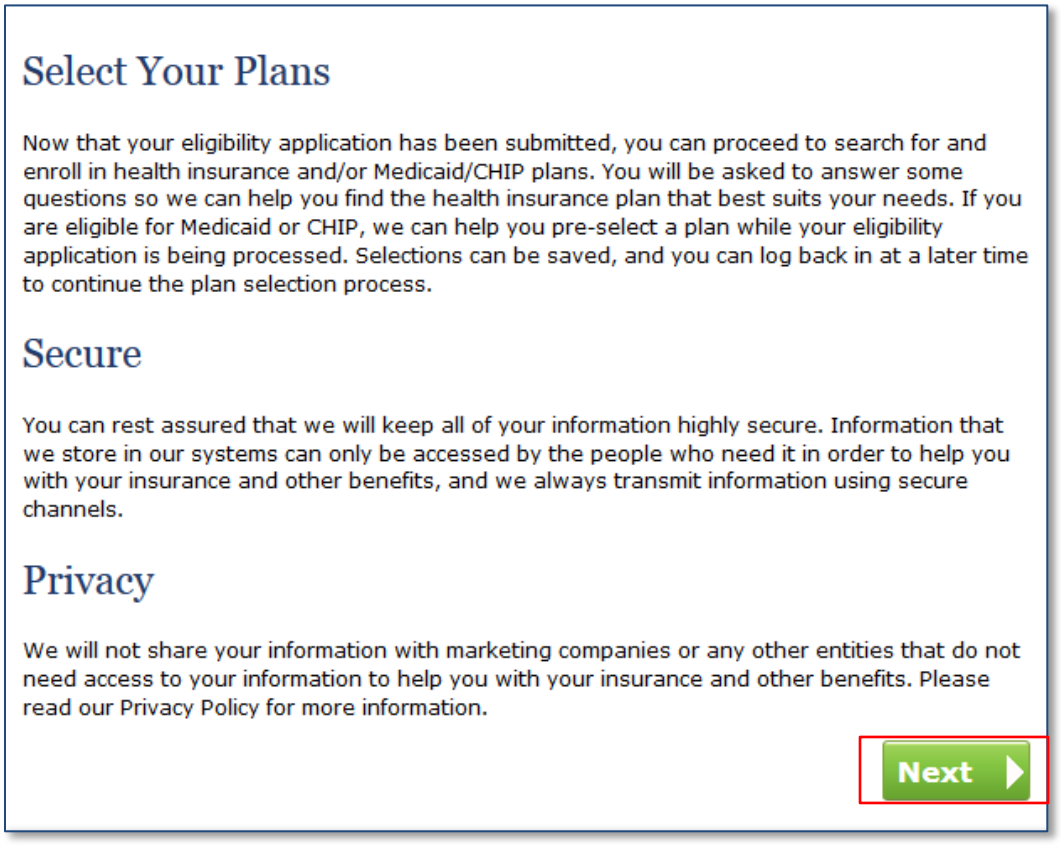


Figure 43: Plan Selection – Select your Plans screen

2. Select **Yes** on the **Your Preferred Primary Care Provider** screen to search for a PCP. Enter search criteria and click **Search**.

Figure 44: Plan Selection –Your Preferred Primary Care Provider screen

3. Browse the search results for the household members' PCPs. Use the checkboxes to select household members associated with a PCP and click **Select** to add them to the **Your Selected PCPs** list.

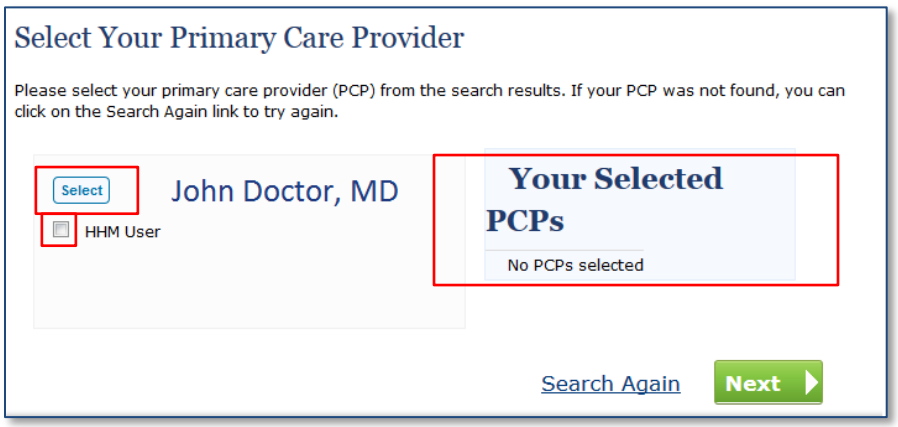


Figure 45: Plan Selection – Select Your Primary Care Provider screen

4. Click **Remove** or **Search Again** to edit the Selected PCPs list, or click **Next** to continue.

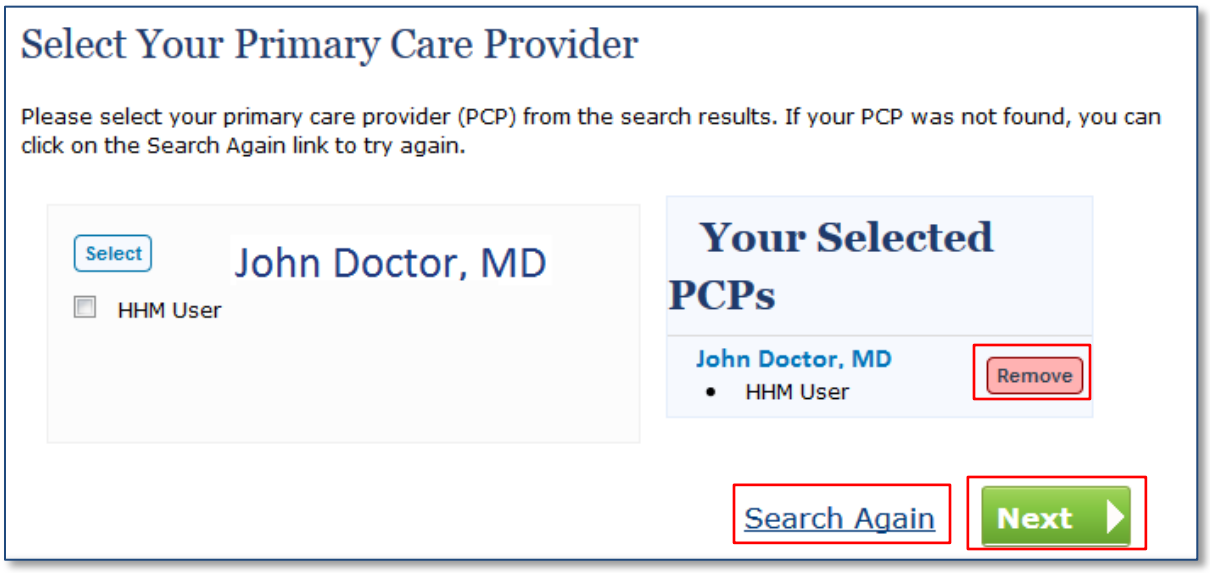


Figure 46: Plan Selection – Select Your Primary Care Provider screen

5. Select **Yes** on the **Your Preferred Clinic / Hospital** screen to search for a clinic or hospital. Enter search criteria and click **Search**.

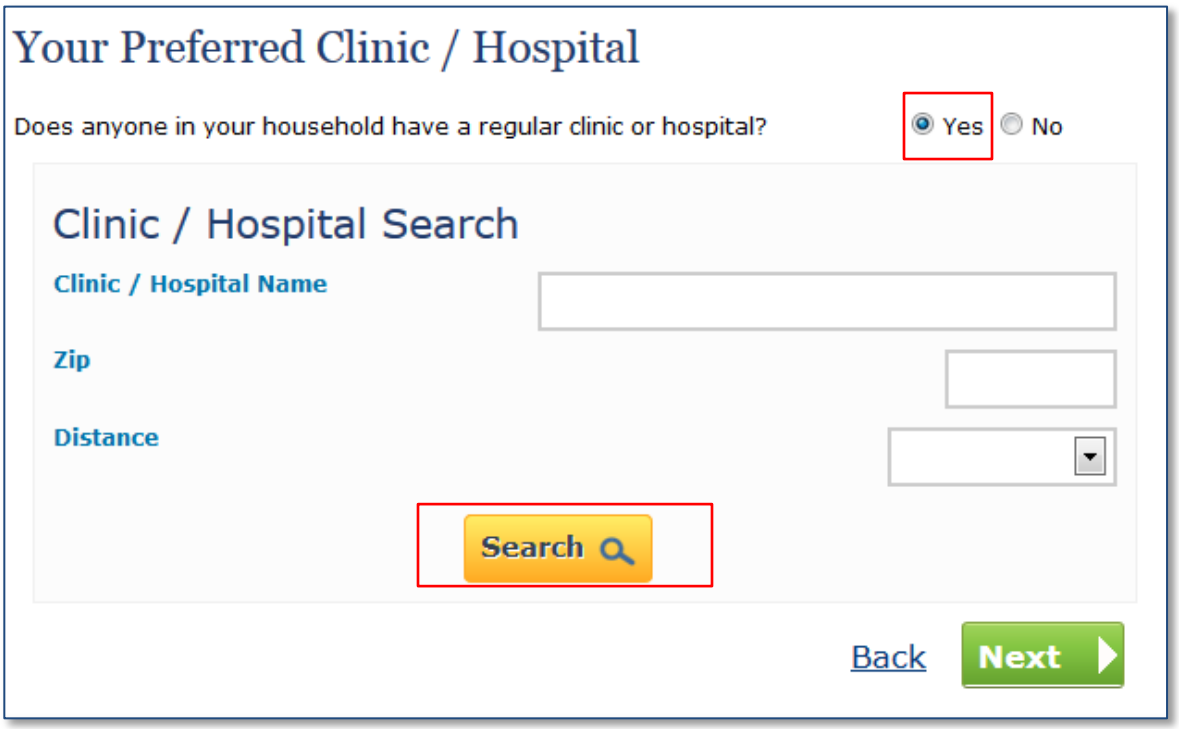


Figure 47: Plan Selection – Your Preferred Clinic / Hospital screen

6. Browse the search results for the household's preferred clinic or hospital. Click **Next** to continue.

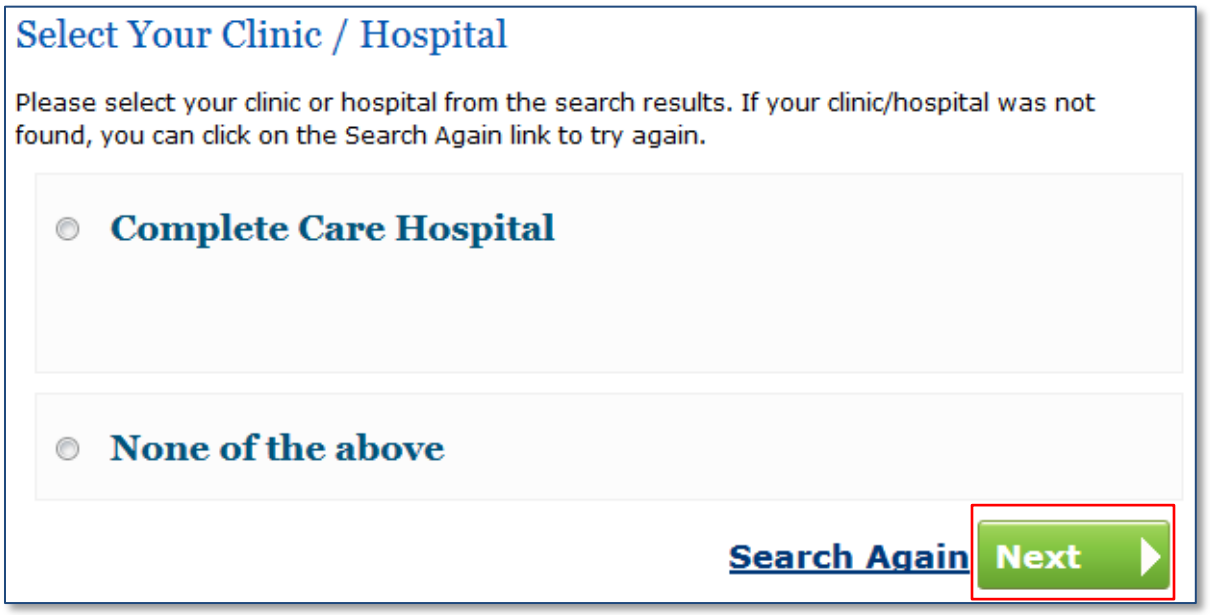


Figure 48: Plan Selection – Select Your Clinic / Hospital screen

7. Review the information displayed and click **Next**. Use the **Edit** links to return to a screen and edit information entered.

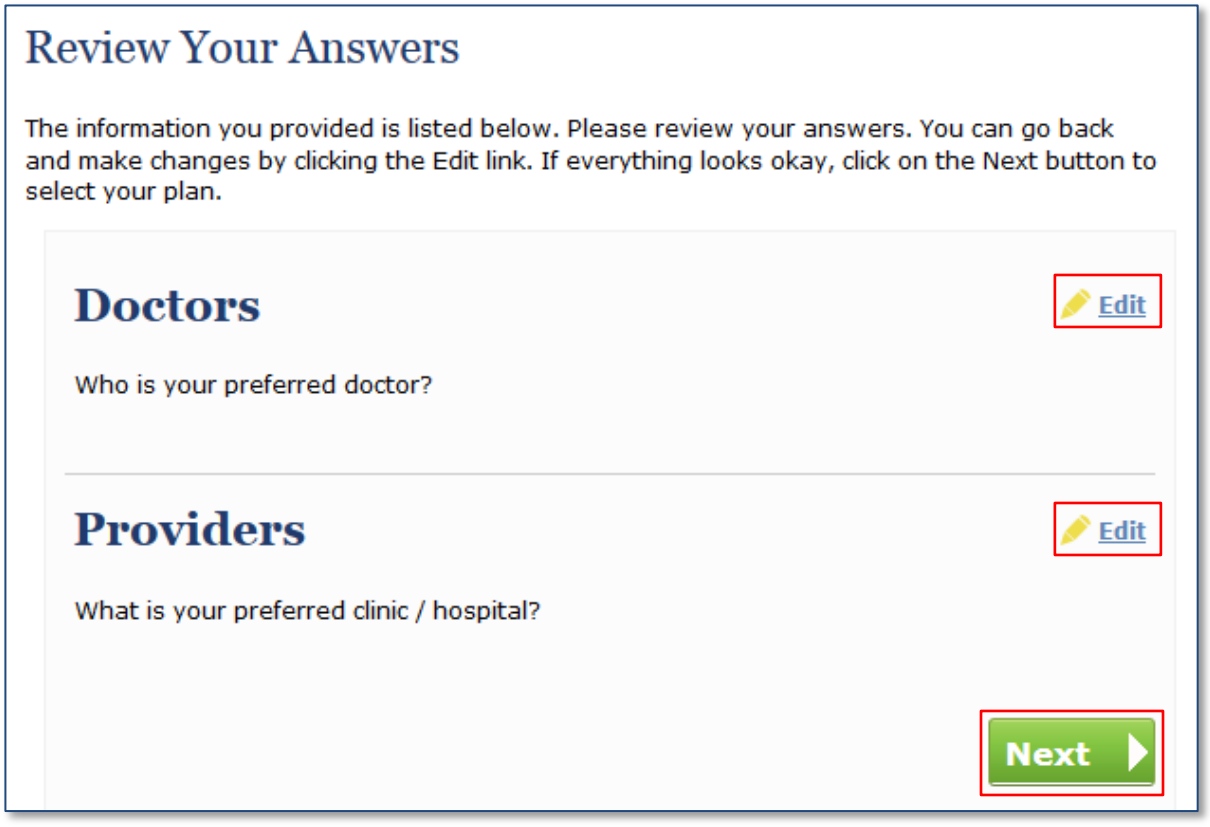


Figure 49: Plan Selection – Review Your Answers screen

8. Select the type of health plan to browse using the **Find** buttons at the top of the screen. Click on the person image and use the checkboxes to select which household members to search plans for.

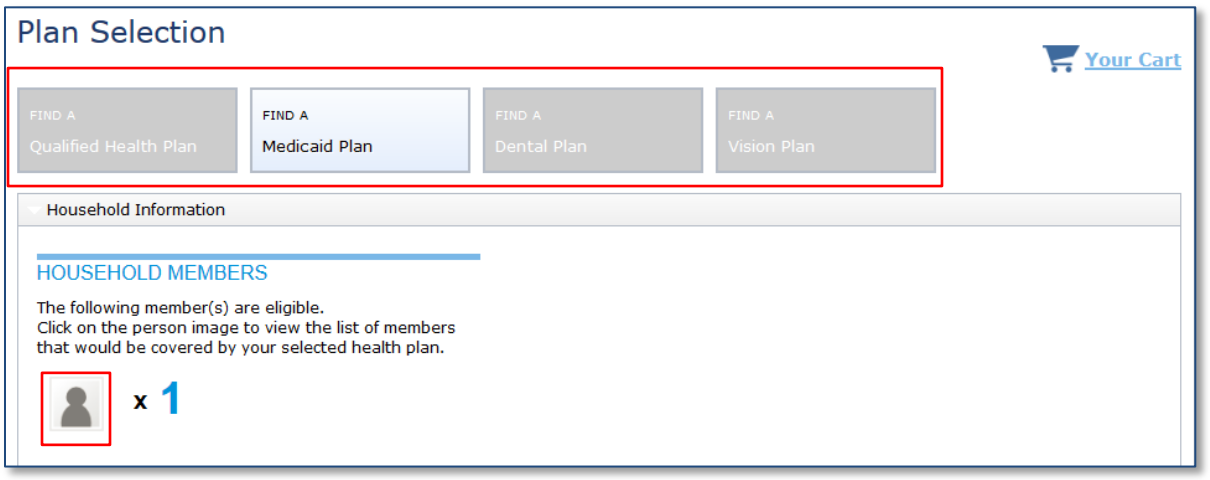


Figure 50: Plan Selection screen

9. Enter filter criteria and click **Show Plans** to view all available plans.

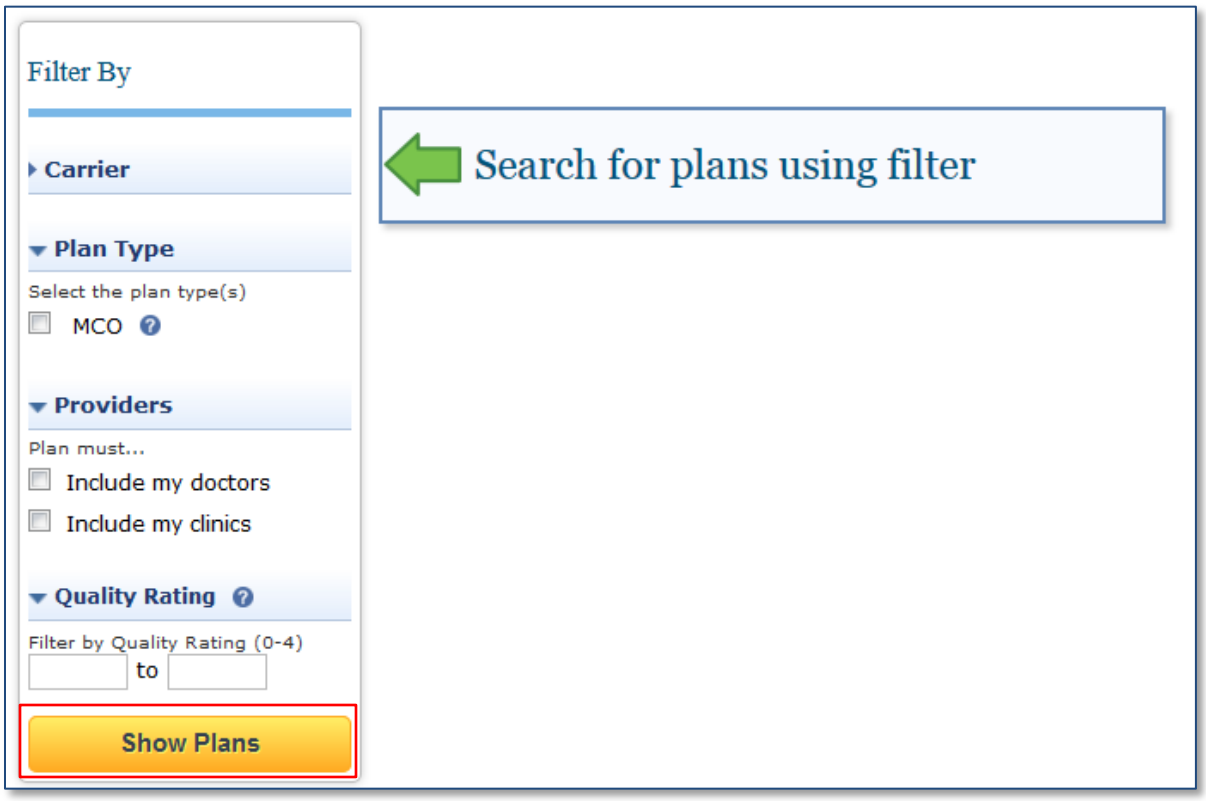


Figure 51: Plan Selection Filter screenshot

10. Select up to three plans from the available list and click **Select and Compare** to compare these plans, **Select** to add a plan to the User's cart, **Plan Details** to view plan documentation, or **View Providers** to view a plan's associated providers. Use the **Sort By** drop-down menu and filter criteria to further refine results.

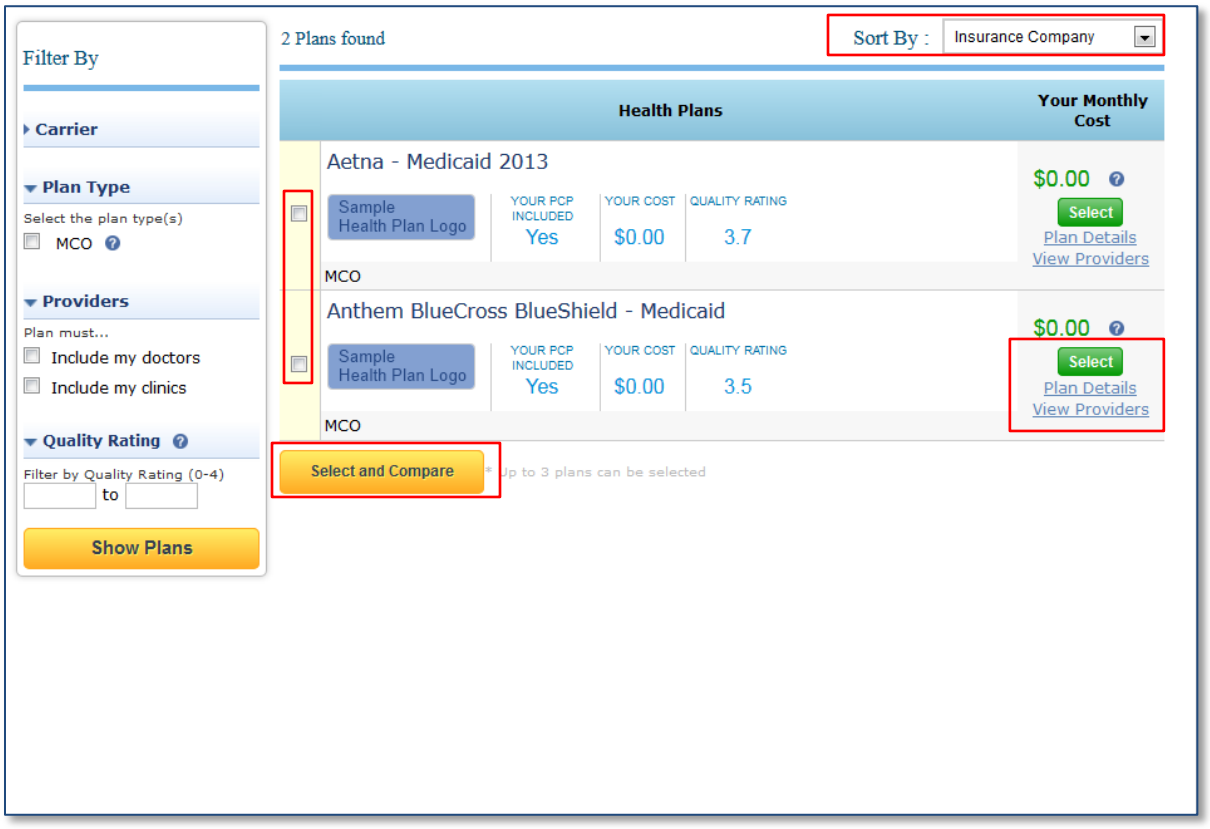


Figure 52: Plan Selection screen

11. On the **Plan Comparison** page, compare plan options side-by-side. Click **Select This Plan** to add a plan to the cart. Use the **compare other plans** link to return to the Plan Selection screen. Users can also view plan documentation and prescription lists by clicking the **Download Details** and **Show Rx** links for each plan.

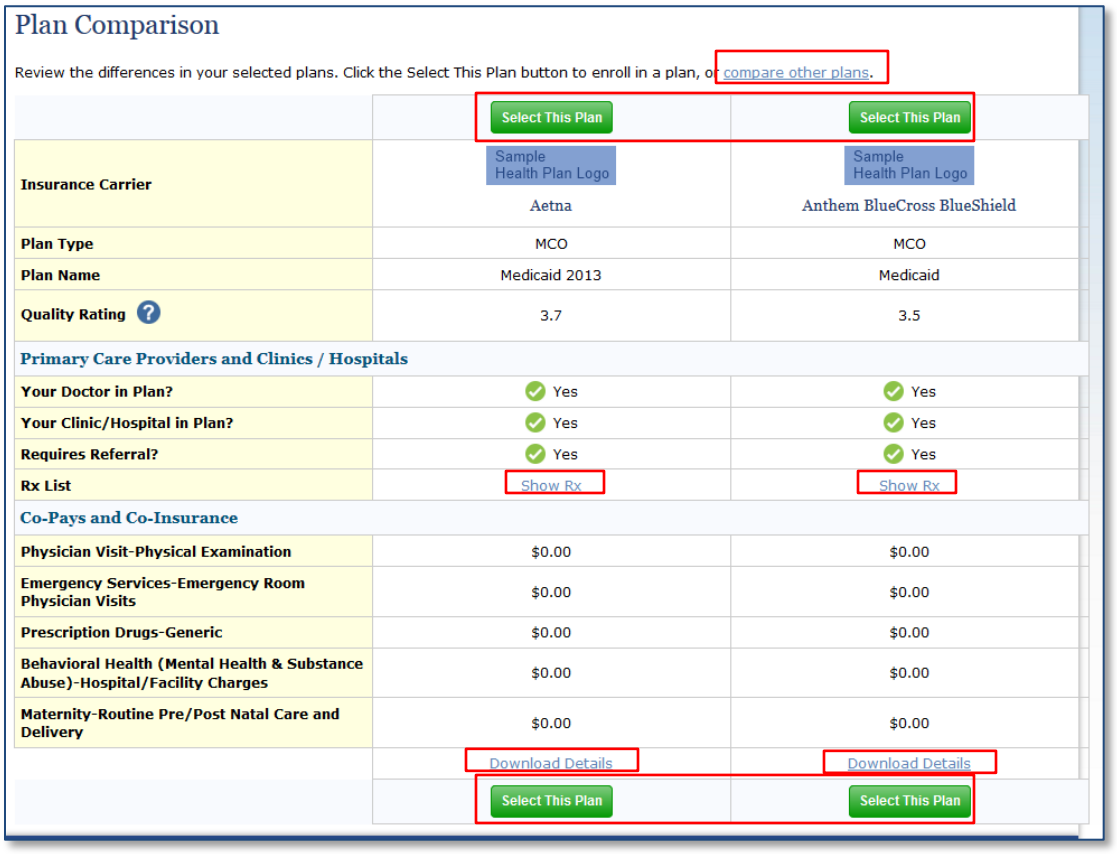


Figure 53: Plan Selection – Plan Comparison screen

12. On the **Plan Selection Cart** page, use the **Search for plans** buttons and household member checkboxes to return to the Plan Selection screen and select other health plans. Use the **Remove** link to remove a plan from the cart. To enroll in the plan, click **Enroll**.

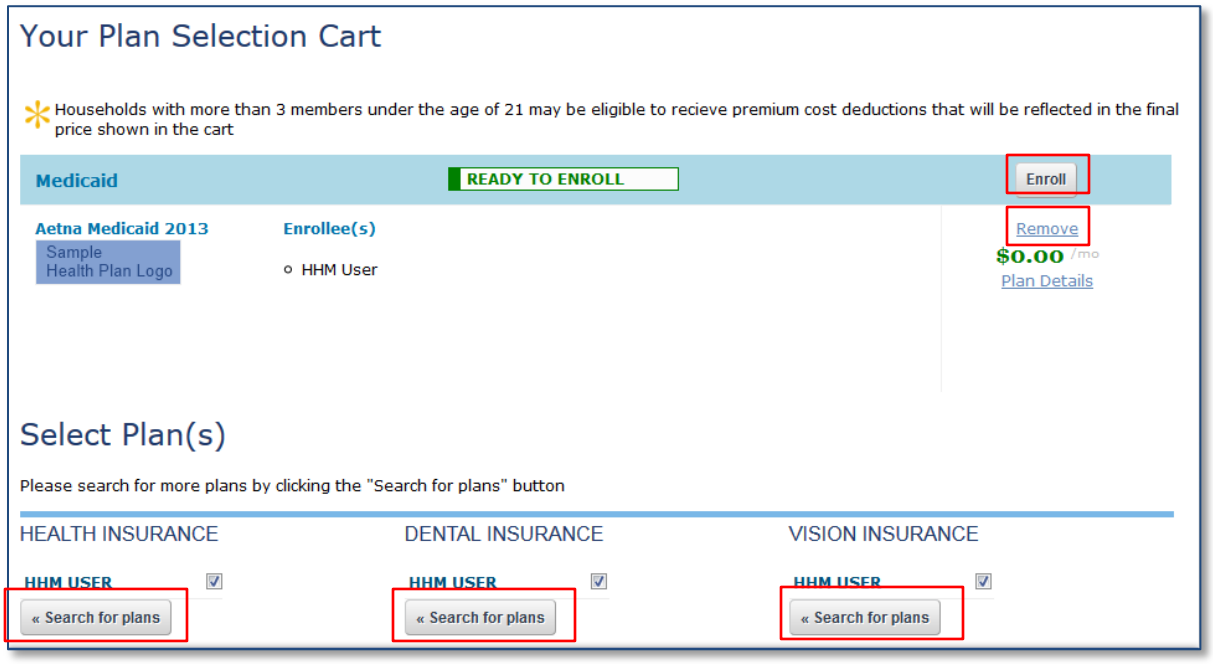
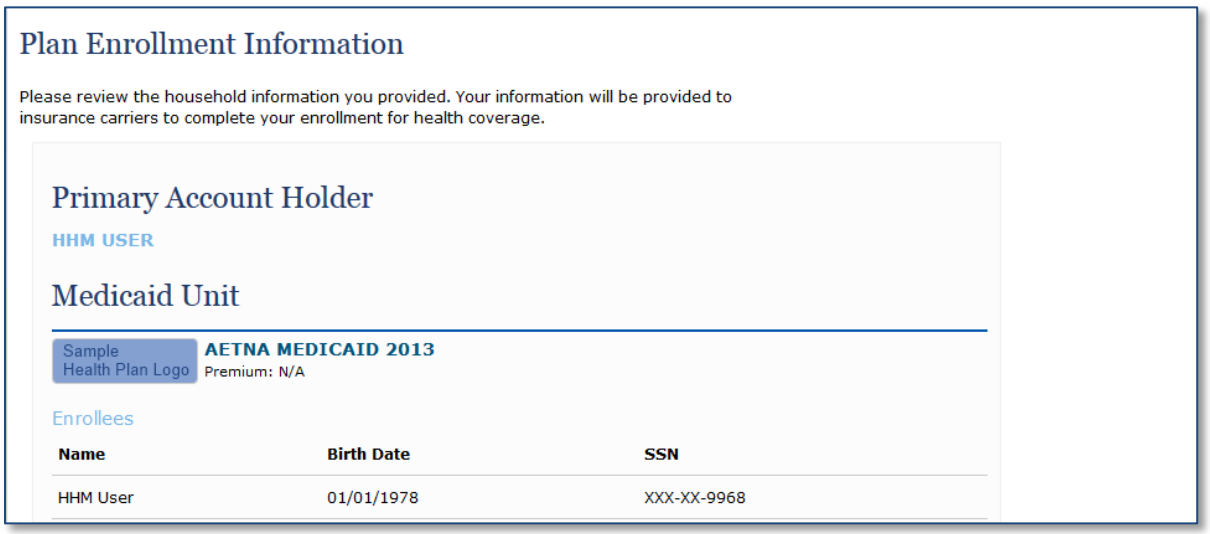


Figure 54: Plan Selection – Your Plan Selection Cart screen

13. Verify the enrollment and contact information, enter a signature, and click **Confirm**.



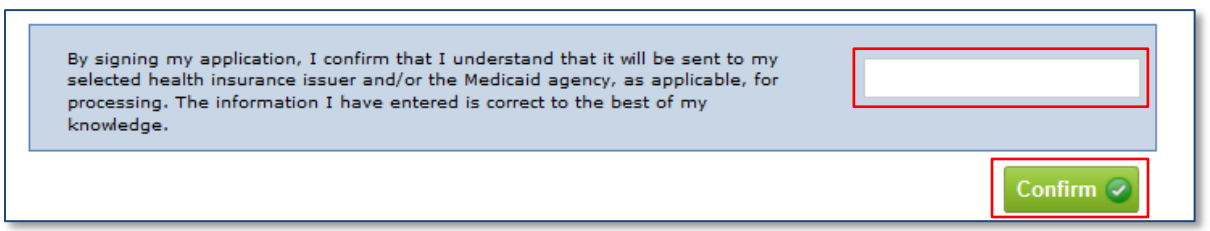


Figure 55: Plan Enrollment Information screen

14. The Health Plan Enrollment Summary screen displays information on the Customer's enrollment. The Customer can note the Confirmation Numbers and print this information for their personal records by clicking the **Print** button. Click the **View Your Insurance Information** button to access the Customer's insurance information on their My Account pages.

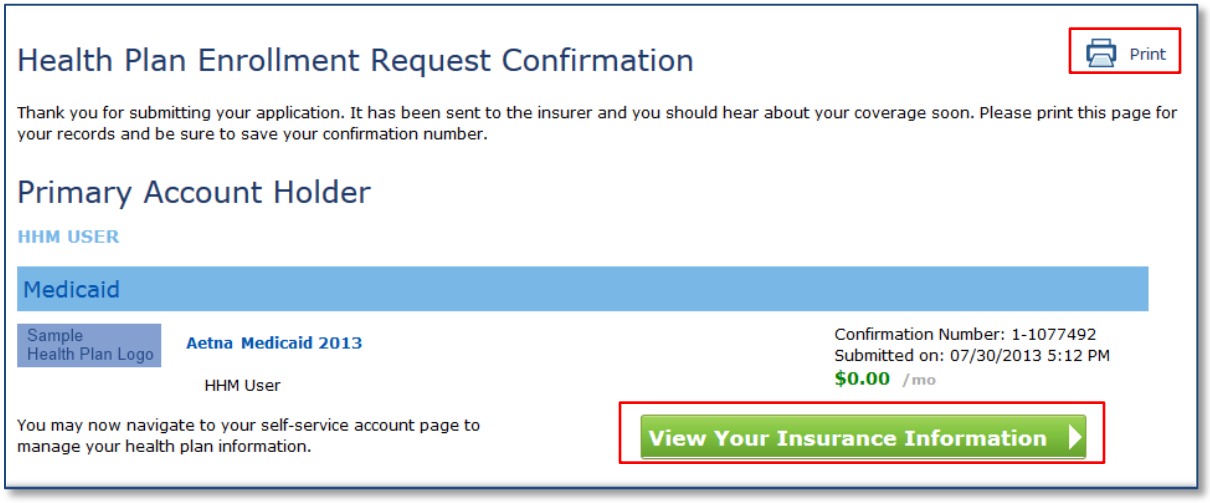


Figure 56: Plan Enrollment – Health Plan Enrollment Confirmation screen

5 My Account (Self-Service)

The following section provides an example of the User navigation through the self-service My Account pages. These pages are displayed as individual tabs for sets of information gathered and generated during non-anonymous processes.

To access the My Account pages from the home page, click on **Individuals & Families** and select **My Account**. Users can also access My Account from a link at the end of the Plan Enrollment process.

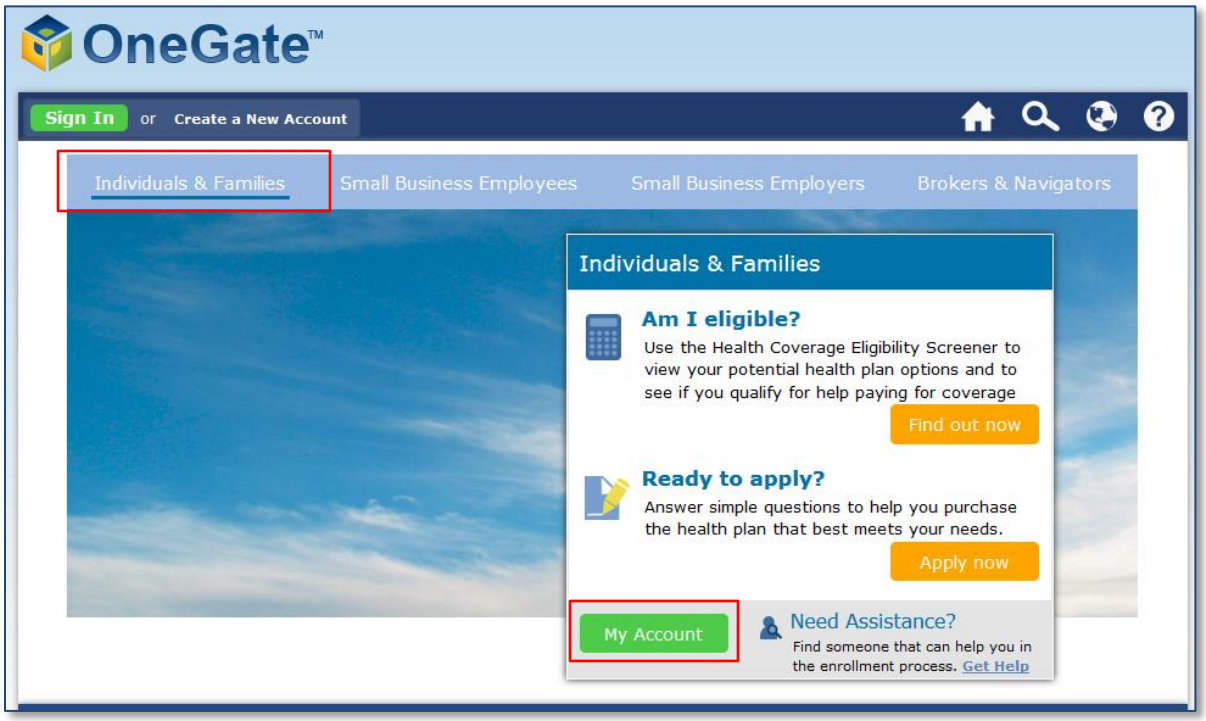


Figure 57: Home Page - Individuals & Families screen

1. The **My Applications** tab displays the Customer's applications. Customers can view or withdraw an application using the **View** and **Withdraw** buttons.

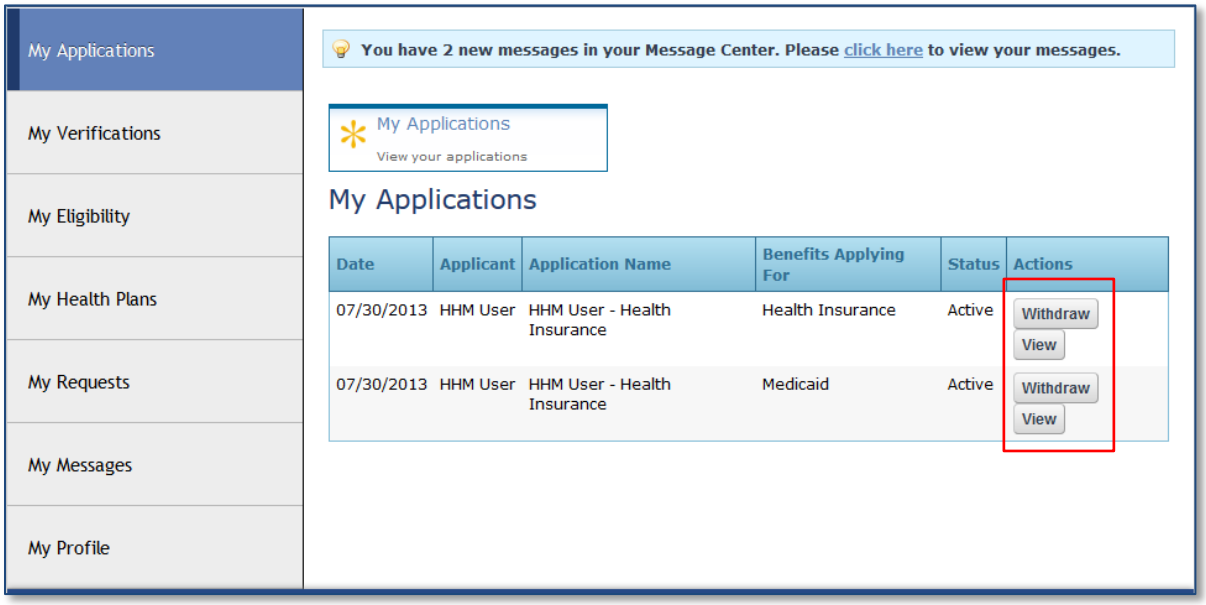


Figure 58: My Account - My Applications tab

2. The **My Verifications** tab displays the Customer's verification items and their status. Users can upload verification documents for pending items by clicking the **Upload/Edit** button. They can then use the **Upload** button or any other existing documents on the **Upload Your Verification Documents** page.

Figure 59: My Account - My Verifications tab

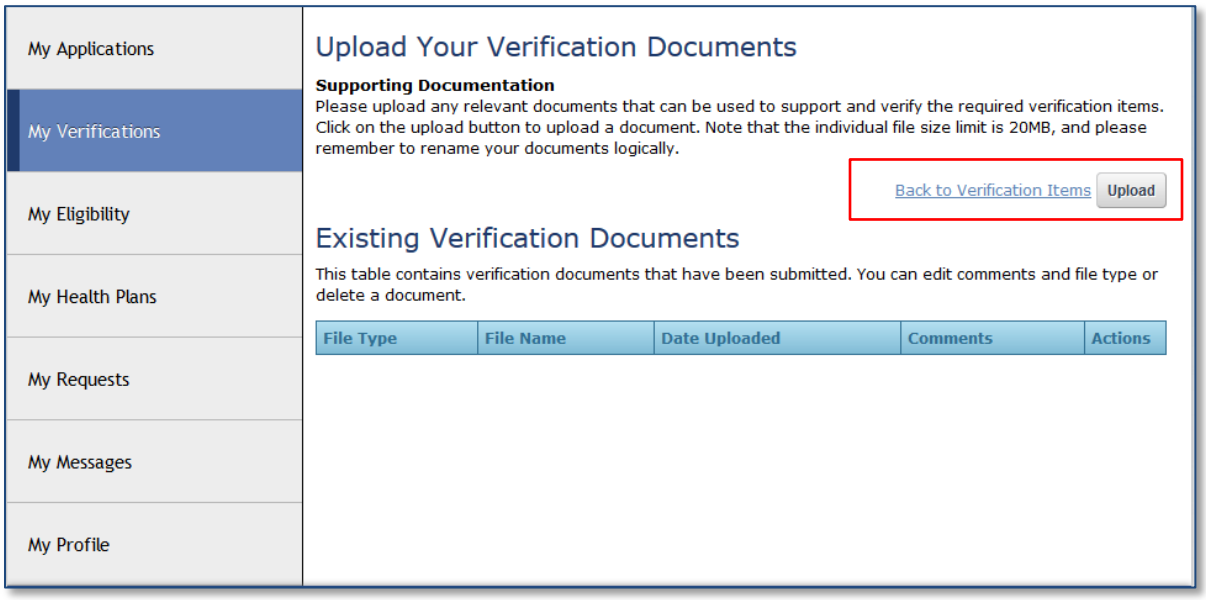


Figure 60: My Account - Upload Your Verification Documents screen

3. The **My Eligibility** tab enables Customers to view each household member's eligibility, as well as current benefits received, and benefits history. The benefits for which each household member has applied for, as well as the status and payment amount (if applicable) for each benefit, are shown. Details on the past status of benefits can be found on the **Past Benefits** sub-tabs. Plan Selection can be accessed from this tab through the **Select a Plan** button.

Figure 61: My Account - My Eligibility tab

4. The **My Health Plans** tab displays health plans in which the Customer is currently enrolled. Customers can disenroll from plans through the **Click here** link (refer to section **8 – Disenrollment** below for more information).

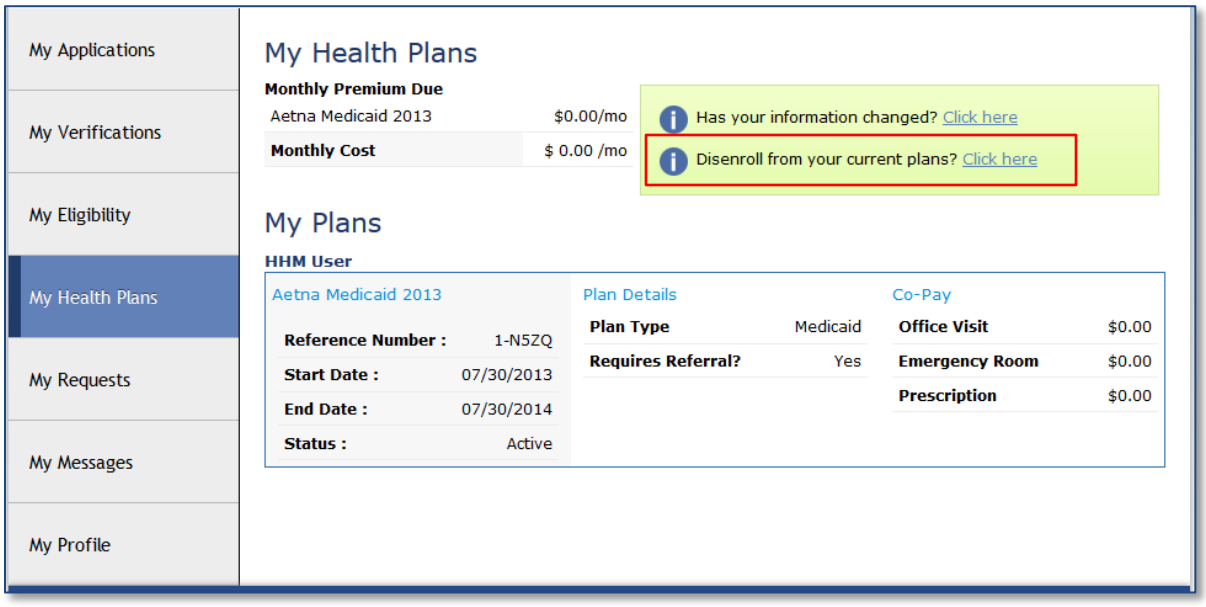


Figure 62: My Account - My Health Plans tab

5. The **My Requests** tab enables Customers to submit requests to caseworkers and view a list of previously submitted requests. Requests include appeals, although Users can also initiate appeals from the Eligibility Determination pages in the application process flow (see section **6.1 – Appeal** below).

   a. To send an appeal, complaint, concern, correction, discrepancy, or question to a caseworker, click on **Submit a Request**.

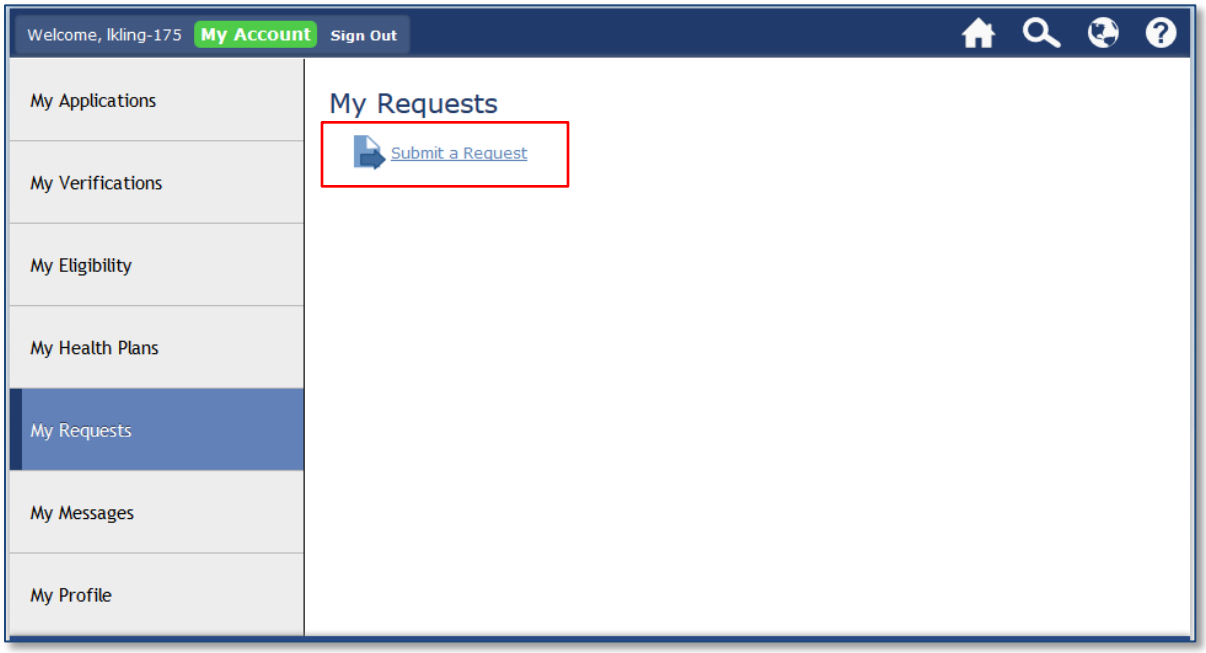


Figure 63: My Account - My Requests tab

b. Select the type of the request and click **Next**.

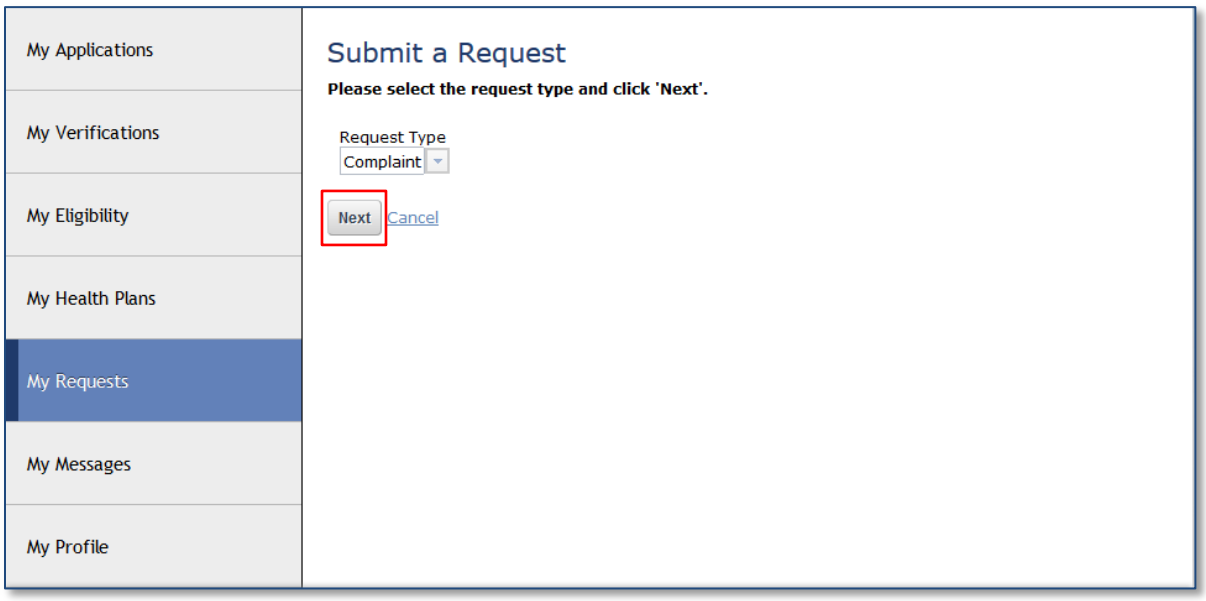


Figure 64: My Account - Submit a Request screen

c. Enter a category and description for the request. Supporting documents can be uploaded using the **Upload** button, and edited using the **Edit** and **Remove** buttons, checkboxes, and **Delete All Selected** links. To submit the request, click **Submit**.

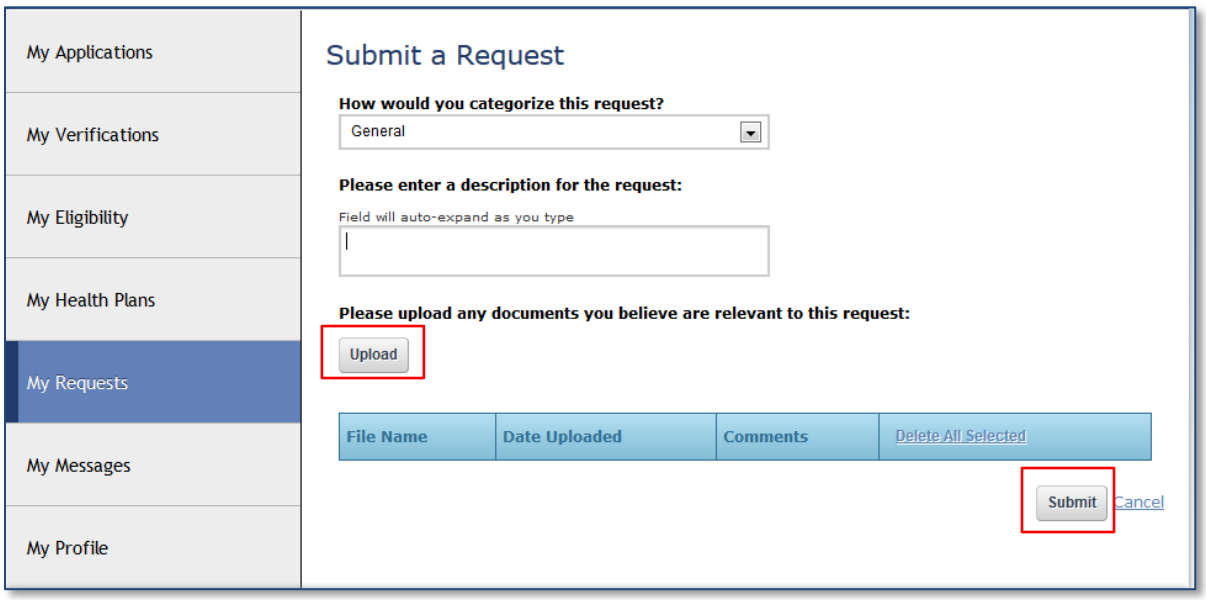


Figure 65: My Account - Submit a Request screen

d. The submitted request and related information are then shown on the **My Requests** tab. Click on the **Request ID** to review the submission, add comments with the **Respond** button, or upload additional documents with the **Upload New Documentation** button.

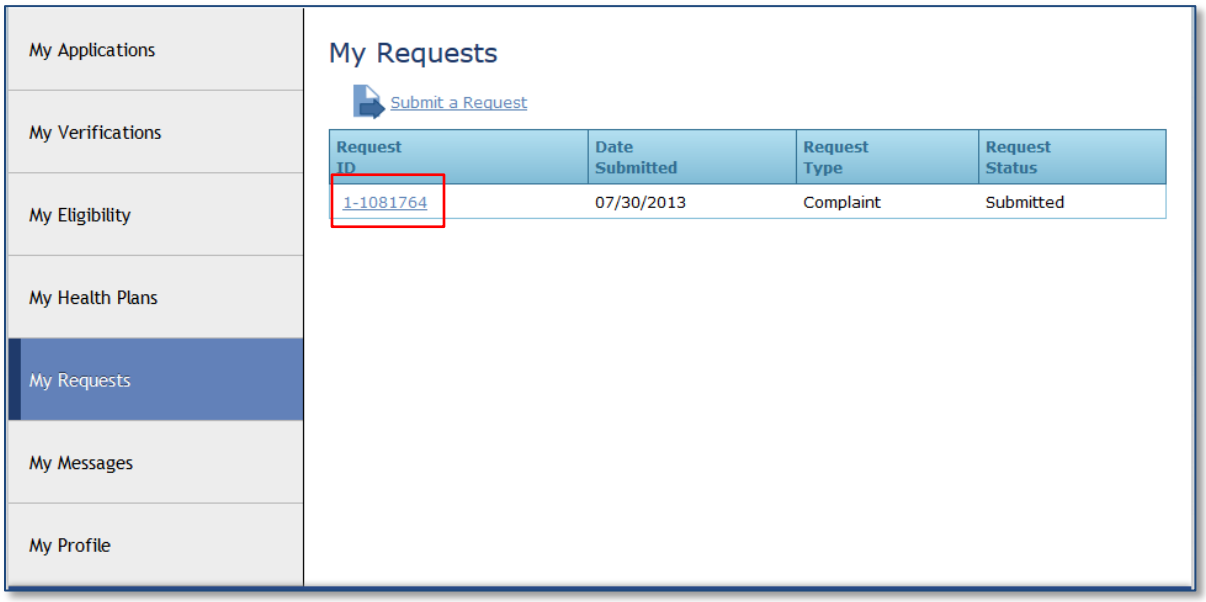


Figure 66: My Account - My Requests tab

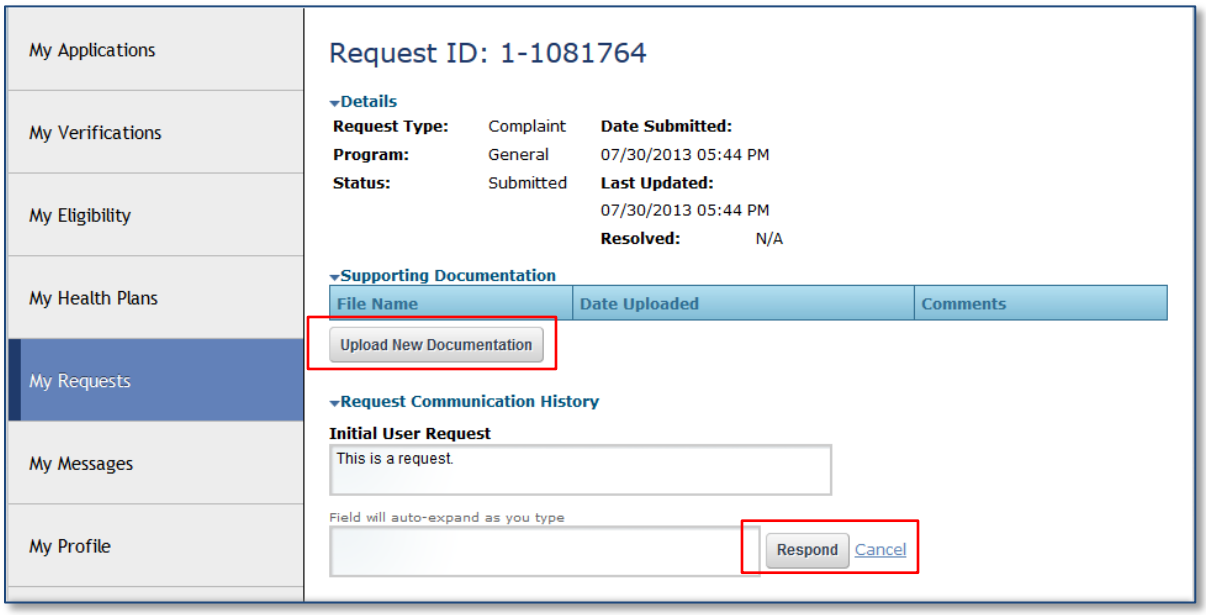


Figure 67: My Account - Request screen

6. The **My Messages** tab enables Customers to view messages and attachments from caseworkers by clicking on a specific message. To return to the message list from a message, click on the **Back to Message List** link.

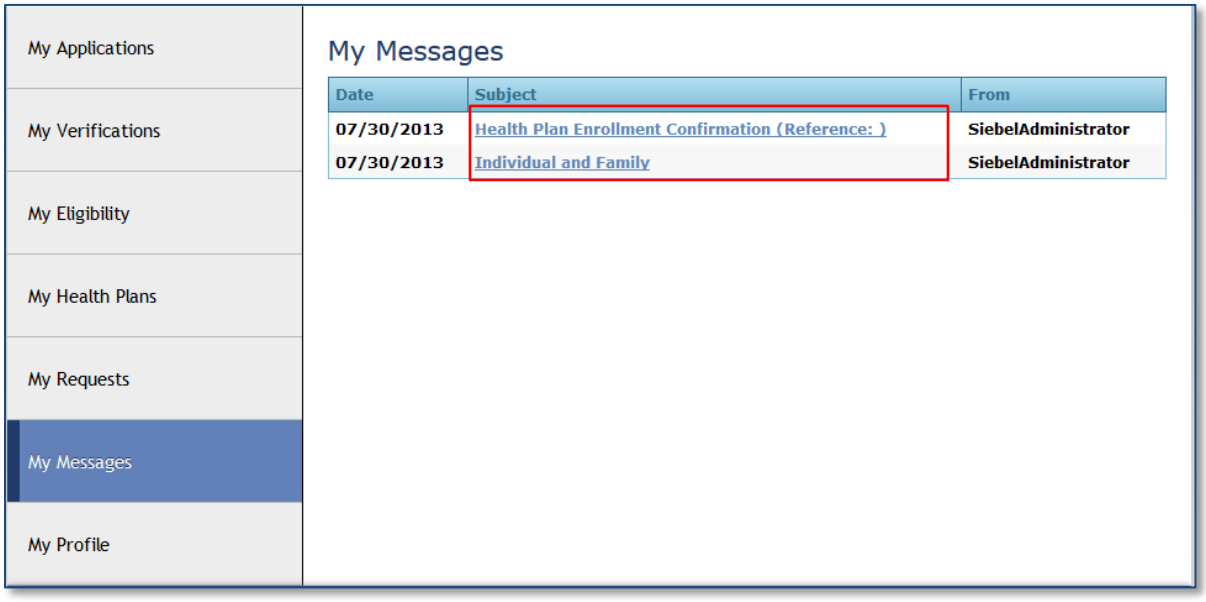
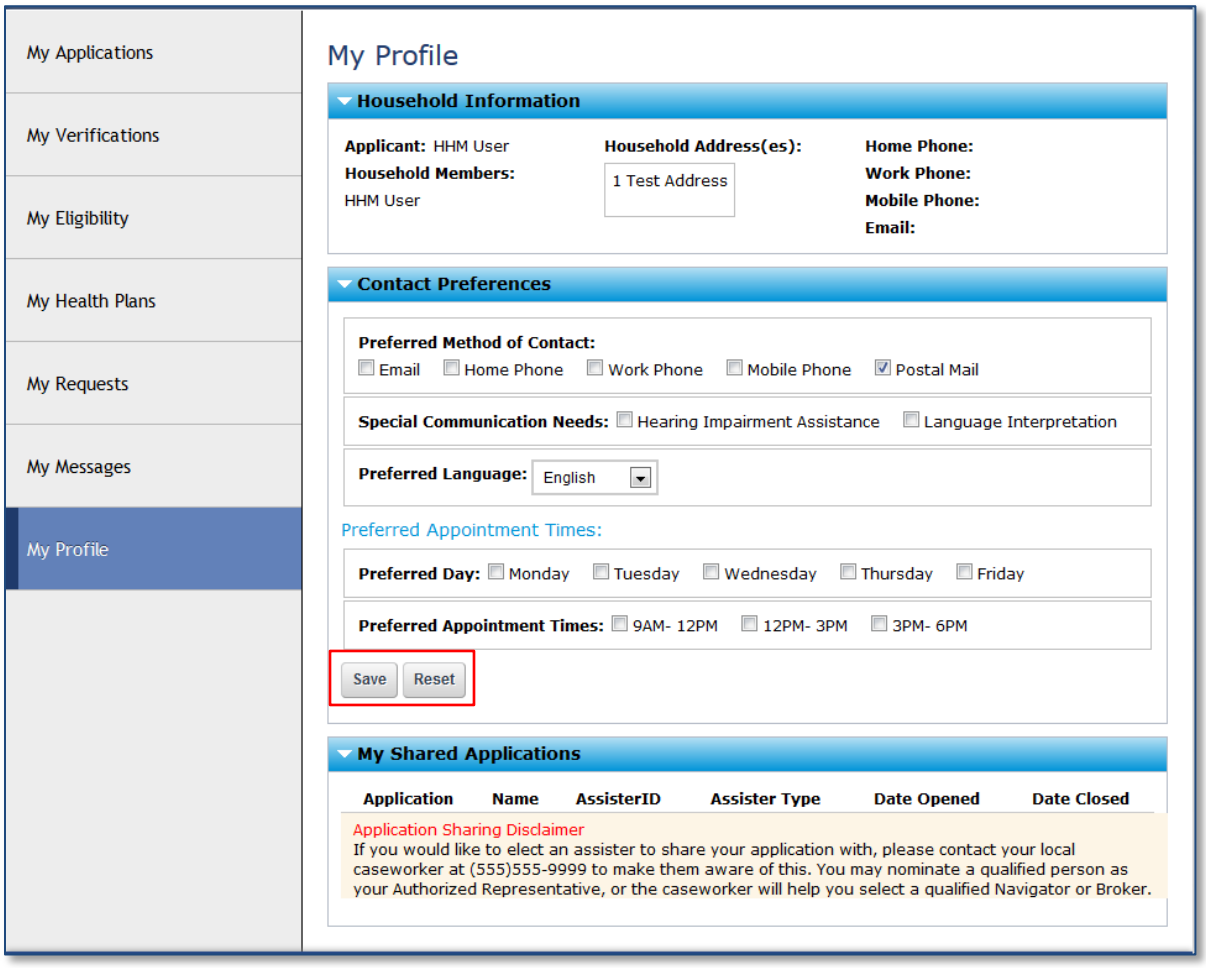


Figure 68: My Account - My Messages tab

Figure 69: My Account - Message screen

7. The **My Profile** tab displays Customer household and contact preference data, including each household member's income, resources and expenses, according to data in OneGate. Customers can edit their contact preferences by using the checkboxes at the bottom of the screen and clicking **Save**.



5.1 Appeal

Appeals can be initiated by submitting a request with the "Appeal" Request Type, or from the **Appeal** button available on the Eligibility Determination page in the application process flow. The following subsection provides an example of the User navigation through this appeal flow.

8. Review the introductory information on the Submitting an Appeal page and click **Next**.

Figure 70: Appeal - Submitting an Appeal screen

9. Select the benefit to appeal and click **Next**.

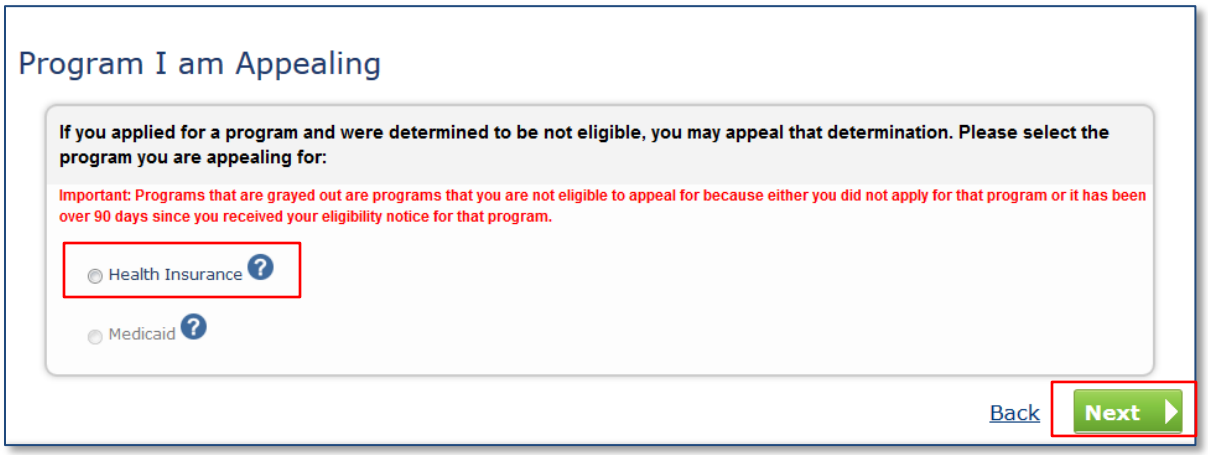


Figure 71: Appeal - Program I am Appealing screen

10. Enter a description of the appeal, and upload supporting documentation with the **Upload** button.

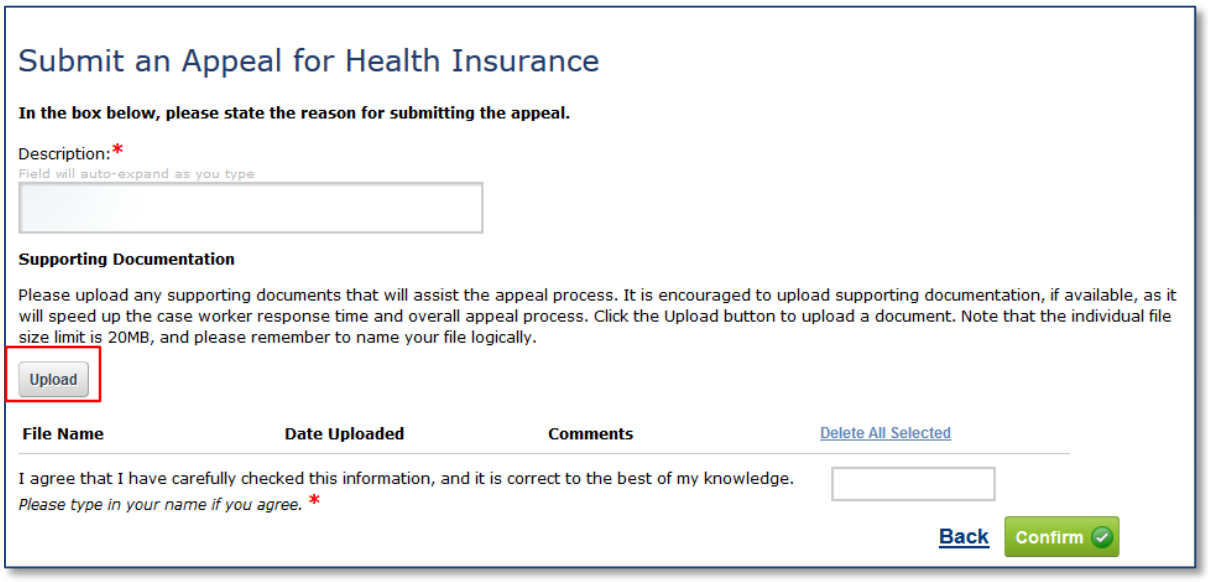


Figure 72: Appeal - Submit an Appeal screen

11. On the Upload Document pop-up, click **Browse** to locate supporting documentation, enter information on the document in the **Comments** box, and click **Submit**.

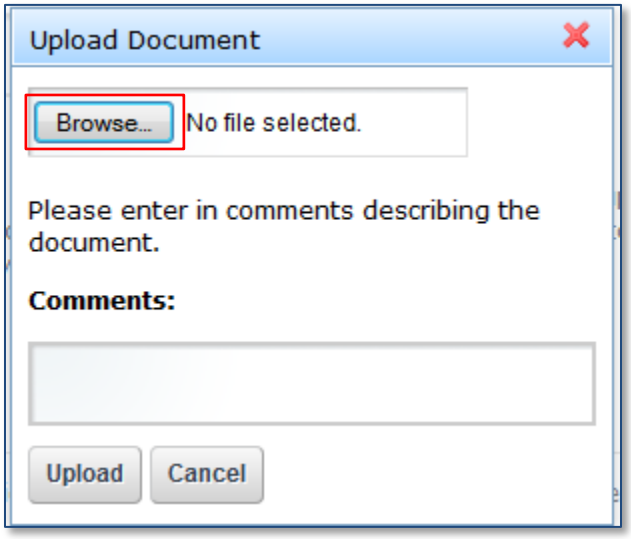


Figure 73: Appeal - Upload Document pop-up

12. Use the checkboxes, **Delete All Selected** link, and edit or delete buttons to edit or delete uploaded documentation. Click **Submit** to continue.

Figure 74: Appeal - Submitting an Appeal screen

13. The appeal is confirmed.

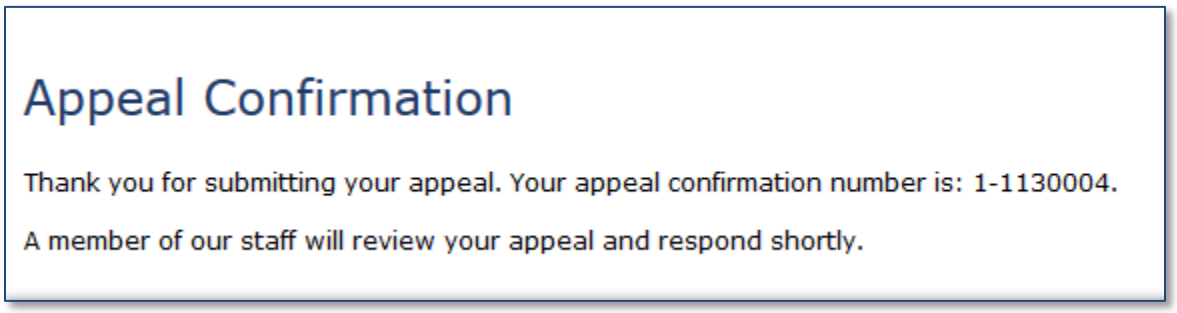


Figure 75: Appeal - Appeal Confirmation screen

14. The submitted appeal and related information are then shown on the **My Requests** tab in My Account. Click Withdraw to withdraw the appeal. Click the appeal's **ID** to review the appeal information.

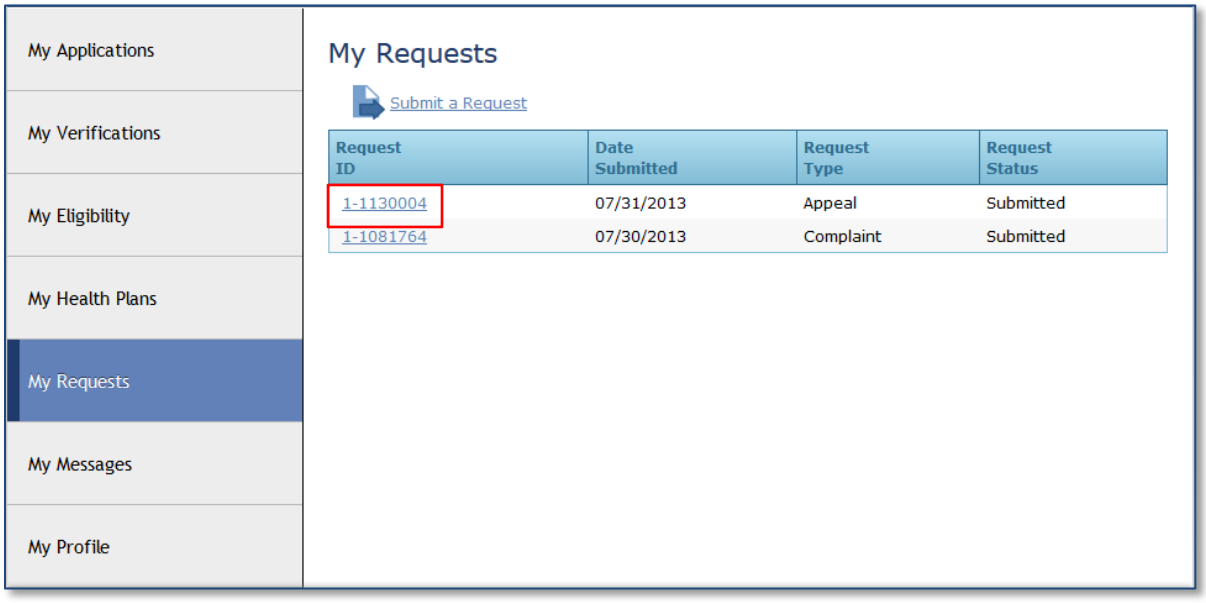


Figure 76: My Account - My Requests tab

15. Caseworker comments on the appeal are listed in the **Comments** section, and the **Status** and **Resolved** fields track the progress of the appeal. Click **Upload New Documentation** to add a new supporting document, or enter comments and click **Respond** to send comments to caseworkers.

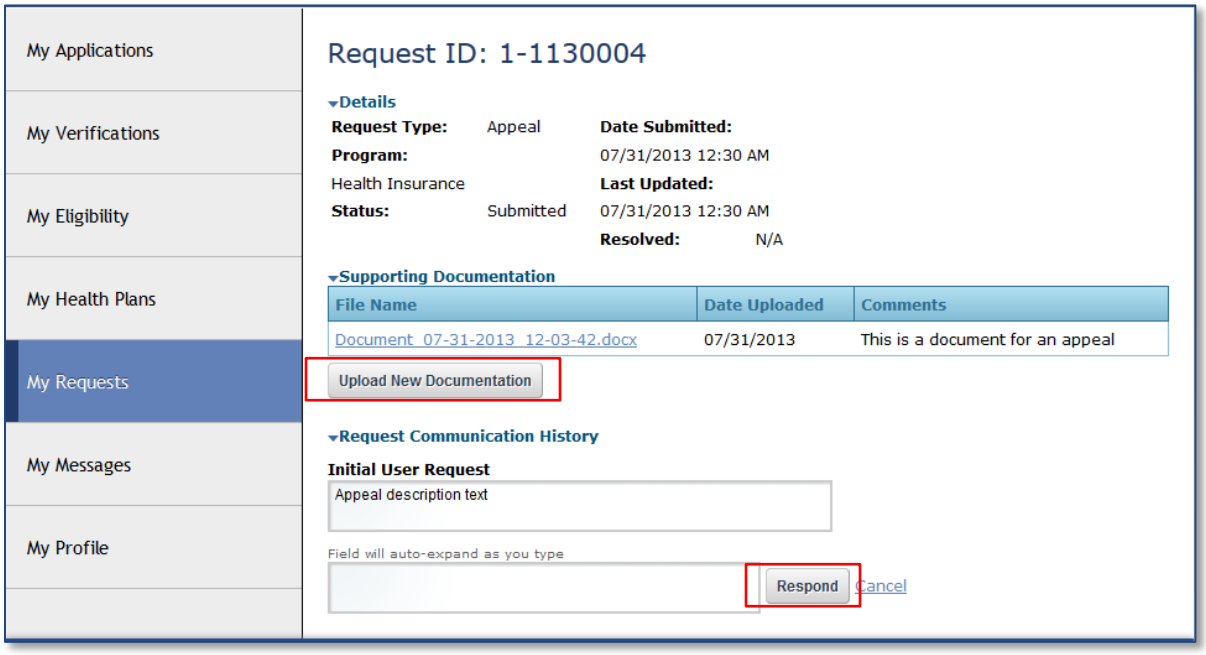


Figure 77: My Account - Request screen

6 Disenrollment

The following section provides an example of the User navigation through the Individuals & Families disenrollment process.

1. To initiate a disenrollment, from the My Health Plans tab on My Account, select the **Click here** link.

Figure 78: My Account - My Health Plans tab

2. Select the plans to disenroll from using the checkboxes, and click **Disenroll Selected**.

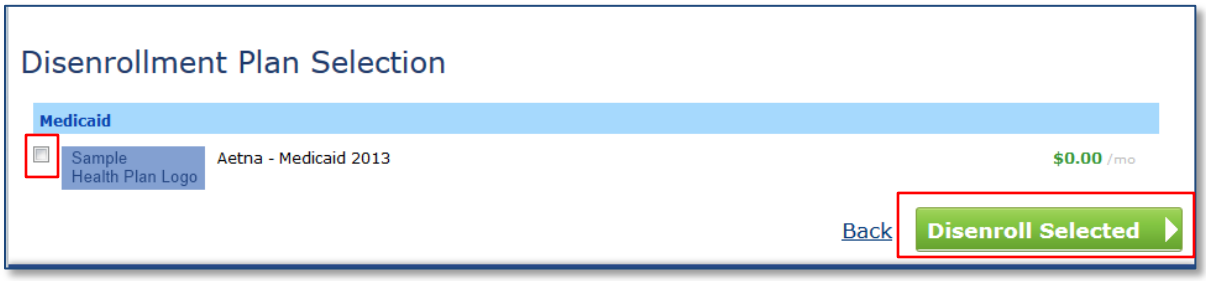


Figure 79: Disenrollment - Disenrollment Plan Selection screen

3. Enter the disenrollment reason and coverage end date, verify with a signature (typically, the User's initials), and click **Next**.

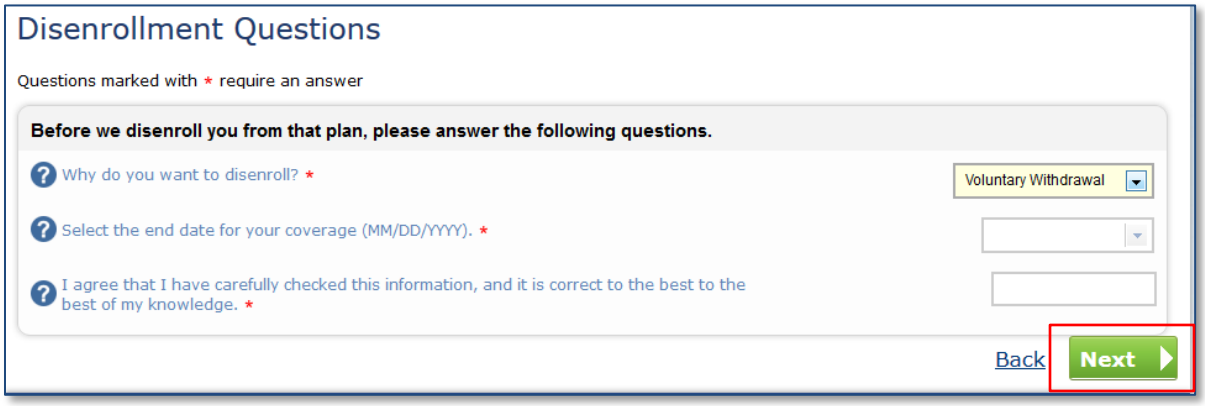


Figure 80: Disenrollment - Disenrollment Questions screen

4. The plans from which the user disenrolled are still displayed on the **My Health Plans** tab in My Account until the coverage end date is reached.

ARMEDICA, INC.
800 BOYLSTON STREET
BOSTON, MA 02199
TEL 617.528.4700
FAX 617.528.5021

DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
San Francisco Regional Office
90 Seventh Street, Suite 5-300 (5W)
San Francisco, CA 94103-6706

CENTERS FOR MEDICARE & MEDICAID SERVICES

DIVISION OF MEDICAID & CHILDREN'S HEALTH OPERATIONS

Patricia McManaman, Director
Department of Human Services
P.O. Box 339
Honolulu, HI 96809-0339

OCT 25 2013

Dear Ms. McManaman:

Enclosed is an approved copy of Hawaii's State Plan Amendment (SPA) 13-0008-MM, which was submitted to CMS on July 12, 2013. SPA 13-0008-MM incorporates the MAGI-based eligibility process requirements, including the single streamlined application, into Hawaii's Medicaid State Plan in accordance with the Affordable Care Act. The effective date of this SPA is October 1, 2013.

The approval of SPA 13-0008-MM includes full approval of your state's paper alternative single streamlined application. The State is using an interim online alternative single streamlined application and by March 31, 2014 will implement a revised online alternative single streamlined application that addresses CMS' concerns outlined in the companion letter issued with this SPA approval.

Enclosed is a copy of the new State Plan pages and attachments to be incorporated within a separate section at the end of Hawaii's approved State Plan:

- Alternative single, streamlined paper application: Application for Health Coverage and Help Paying Costs; Things to Know page and pages 1-7; Appendix A, Health Coverage from Jobs; Employer Coverage Tool; Appendix B, American Indian or Alaska native Family Member (AI/AN); Appendix C, Assistance with Completing this Application;
- Application for Health Insurance & Help Paying Costs (Short Form), Things to Know and pages 1-3; Appendix C Assistance with Completing this Application
- S94, pages S94-1 and S94-2; which includes the statements noted below:
    - Statement related to Coordination of Eligibility and Enrollment
    - Statements of use with respect to the alternative single, streamlined online application

CMS appreciates the significant amount of work your staff dedicated to preparing this State Plan Amendment. If you have any questions concerning this SPA, please contact Christy Bonstelle at 415-744-3522, or by e-mail at Christy.Bonstelle@cms.hhs.gov.

Sincerely,

[redacted]
Gloria Nagle, Ph.D., MPA
Associate Regional Administrator
Division of Medicaid & Children's Health Operations

cc: Kenny Fink, Med-QUEST Administrator
Tom Duran, CMS Pacific Area Representative

Medicaid State Plan Eligibility: Summary Page (CMS 179)

State/Territory name: **Hawaii**

Transmittal Number:

Please enter the Transmittal Number (TN) in the format ST-YY-0000 where ST= the state abbreviation, YY = the last two digits of the submission year, and 0000 = a four digit number with leading zeros. The dashes must also be entered.

13-0008 ~mm

Proposed Effective Date

10/01/2013 *(mm/dd/yyyy)*

Federal Statute/Regulation Citation

42 C.F.R. 435, Subpart J and Subpart M

Federal Budget Impact

	Federal Fiscal Year	Amount
First Year	2014	$ 0.00
Second Year	2015	$ 0.00

Subject of Amendment

The proposed amendments to the State Plan would implement provisions of the Patient Protection and Affordable Care Act of 2010 and the Health Care and Education Reconciliation Act of 2010. The proposed amendments implements the new eligibility process as described in 42 C.F.R 435, Subpart J and Subpart M.

Governor's Office Review

- (○) **Governor's office reported no comment**
- (○) **Comments of Governor's office received**
  Describe:
- (○) **No reply received within 45 days of submittal**
- (◉) **Other, as specified**
  Describe:
  As approved by the Governor

Signature of State Agency Official

Submitted By:	**Aileen Befitel**
Last Revision Date:	**Oct 16, 2013**
Submit Date:	**Jul 12, 2013**

DATE RECEIVED:	DATE APPROVED:
7/12/2013	10/25/2013
PLAN APPROVED – ONE COPY ATTACHED	
EFFECTIVE DATE OF APPROVED MATERIAL:	**SIGNATURE OF REGIONAL OFFICIAL:**
10/1/2013	[redacted]
TYPED NAME	**TITLE**
Gloria Nagle	Associate Regional Administrator

USE OF THE ALTERNATIVE SINGLE STREAMLINED APPLICATION ☐ Paper Application ☒ Online Application	
TRANSMITTAL NUMBER: 13-0008-MM	**STATE:** Hawaii
Through March 31, 2014, the state is using an interim online alternative single streamlined application. After March 31, 2014, the state will use a revised online alternative single streamlined application, which will address the issues outlined in the CMS letter dated October 1, 2014 concerning the state's application. The revised application will be incorporated by reference into the state plan.	

Medicaid Eligibility

OMB Control Number 0938-1148
OMB Expiration date: 10/31/2014

General Eligibility Requirements
Eligibility Process **S94**

42 CFR 435, Subpart J and Subpart M

Eligibility Process

☑ The state meets all the requirements of 42 CFR 435, Subpart J for processing applications, determining and verifying eligibility, and furnishing Medicaid.

Application Processing

Indicate which application the agency uses for individuals applying for coverage who may be eligible based on the applicable modified adjusted gross income standard.

☐ The single, streamlined application for all insurance affordability programs, developed by the Secretary in accordance with section 1413(b)(1)(A) of the Affordable Care Act

☒ An alternative single, streamlined application developed by the state in accordance with section 1413(b)(1)(B) of the Affordable Care Act and approved by the Secretary, which may be no more burdensome than the streamlined application developed by the Secretary.

An attachment is submitted.

☐ An alternative application used to apply for multiple human service programs approved by the Secretary, provided that the agency makes readily available the single or alternative application used only for insurance affordability programs to individuals seeking assistance only through such programs.

An attachment is submitted.

Indicate which application the agency uses for individuals applying for coverage who may be eligible on a basis other than the applicable modified adjusted gross income standard:

☐ The single, streamlined application developed by the Secretary or one of the alternate forms developed by the state and approved by the Secretary, and supplemental forms to collect additional information needed to determine eligibility on such other basis, submitted to the Secretary.

An attachment is submitted.

☒ An application designed specifically to determine eligibility on a basis other than the applicable MAGI standard which minimizes the burden on applicants, submitted to the Secretary.

An attachment is submitted.

The agency's procedures permit an individual, or authorized person acting on behalf of the individual, to submit an application via the internet website described in 42 CFR 435.1200(f), by telephone, via mail, and in person.

The agency also accepts applications by other electronic means:

◉ Yes ○ No

Indicate the other electronic means below:

	Name of Method	Description	
+	Facsimile	The agency accepts applications received via facsimile.	X
+	E-mail	The agency accepts applications received via e-mail.	X

☑ The agency has procedures to take applications, assist applicants and perform initial processing of applications for the eligibility groups listed below at locations other than those used for the receipt and processing of applications for the title IV-A program, including Federally-qualified health centers and disproportionate share hospitals.

Parents and Other Caretaker Relatives

Pregnant Women

Infants and Children under Age 19

Redetermination Processing

☑ Redeterminations of eligibility for individuals whose financial eligibility is based on the applicable modified adjusted gross income standard are performed as follows, consistent with 42 CFR 435.916:

■ Once every 12 months

■ Without requiring information from the individual if able to do so based on reliable information contained in the individual's account or other more current information available to the agency

■ If the agency cannot determine eligibility solely on the basis of the information available to it, or otherwise needs additional information to complete the redetermination, it provides the individual with a pre-populated renewal form containing the information already available.

■ Redeterminations of eligibility for individuals whose financial eligibility is not based on the applicable modified adjusted gross income standard are performed, consistent with 42 CFR 435.916 (check all that apply):

☒ Once every 12 months

☐ Once every 6 months

☐ Other, more often than once every 12 months

Coordination of Eligibility and Enrollment

☑ The state meets all the requirements of 42 CFR 435, Subpart M relative to coordination of eligibility and enrollment between Medicaid, CHIP, Exchanges and other insurance affordability programs. The single state agency has entered into agreements with the Exchange and with other agencies administering insurance affordability programs.

PRA Disclosure Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1148. The time required to complete this information collection is estimated to average 40 hours per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

Health Insurance Marketplace

TBD

HealthCare.gov → mybenefits.hawaii.gov
1-800-XXX-XXXX → 1-877-628-5076

PLEASE REFER TO ATTACHMENT 3

V. 7/12/13

Application for Health Coverage & Help Paying Costs

Use this application to see what coverage choices you qualify for

- Affordable private health insurance plans that offer comprehensive coverage to help you stay well
- A new tax credit that can immediately help pay your premiums for health coverage
- Free or low-cost insurance from Medicaid or the Children's Health Insurance Program (CHIP)

You may qualify for a free or low-cost program even if you earn as much as $94,000 a year (for a family of 4).

Who can use this application?

- Use this application to apply for anyone in your family.
- Apply even if you or your child already has health coverage. You could be eligible for lower-cost or free coverage.
- If you're single, you may be able to use a short form. Visit HealthCare.gov.
- Families that include immigrants can apply. You can apply for your child even if you aren't eligible for coverage. Applying won't affect your immigration status or chances of becoming a permanent resident or citizen.
- If someone is helping you fill out this application, you may need to complete Appendix C.

THINGS TO KNOW

Apply faster online

Apply faster online at HealthCare.gov.

What you may need to apply

- Social Security Numbers (or document numbers for any legal immigrants who need insurance)
- Employer and income information for everyone in your family (for example, from paystubs, W-2 forms, or wage and tax statements)
- Policy numbers for any current health insurance
- Information about any job-related health insurance available to your family

Why do we ask for this information?

We ask about income and other information to let you know what coverage you qualify for and if you can get any help paying for it. **We'll keep all the information you provide private and secure, as required by law.**

What happens next?

Send your complete, signed application to the address on page 7. **If you don't have all the information we ask for, sign and submit your application anyway.** We'll follow-up with you within 1-2 weeks. You'll get instructions on the next steps to complete your health coverage. If you don't hear from us, visit HealthCare.gov or call **1-800-XXX-XXXX**. Filling out this application doesn't mean you have to buy health coverage.

Get help with this application

- **Online:** HealthCare.gov
- **Phone:** Call our Help Center at **1-800-XXX-XXXX.**
- **In person:** There may be counselors in your area who can help. Visit our website or call **1-800-XXX-XXXX** for more information.
- ~~**En Español:** Llame a nuestro centro de ayuda gratis al 1-800-XXX-XXXX.~~

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX**. ~~Para obtener una copia de esta formulario en Español, llame 1-800-XXX-XXXX.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**

STEP 1 Tell us about yourself.

(We need one adult in the family to be the contact person for your application.)

1. First name, Middle name, Last name, & Suffix

2. Home address (Leave blank if you don't have one.)			3. Apartment or suite number
4. City	5. State	6. ZIP code	7. County
8. Mailing address (if different from home address)			9. Apartment or suite number
10. City	11. State	12. ZIP code	13. County

14. Phone number	15. Other phone number
( ) -	( ) -

16. Do you want to get information about this application by email? ☐ Yes ☐ No

Email address:

17. Preferred spoken or written language (if not English)

STEP 2 Tell us about your family.

Who do you need to include on this application?

Tell us about all the family members who live with you. If you file taxes, we need to know about everyone on your tax return. (You don't need to file taxes to get health coverage).

DO include:

- Yourself
- Your spouse
- Your children under 21 who live with you
- Your unmarried partner who needs health coverage
- Anyone you include on your tax return, even if they don't live with you
- Anyone else under 21 who you take care of and lives with you

You DON'T have to include:

- Your unmarried partner who doesn't need health coverage
- Your unmarried partner's children
- Your parents who live with you, but file their own tax return (if you're over 21)
- Other adult relatives who file their own tax return

The amount of assistance or type of program you qualify for depends on the number of people in your family and their incomes. This information helps us make sure everyone gets the best coverage they can.

Complete Step 2 for each person in your family. Start with yourself, then add other adults and children. If you have more than 2 people in your family, you'll need to make a copy of the pages and attach them. You don't need to provide immigration status or a Social Security Number (SSN) for family members who don't need health coverage. We'll keep all the information you provide private and secure as required by law. We'll use personal information only to check if you're eligible for health coverage.

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX**. ~~Para obtener una copia de este formulario en Español, llame **1-800-XXX-XXXX**.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**

STEP 2: PERSON 1 (Start with yourself)

Complete Step 2 for yourself, your spouse/partner and children who live with you and/or anyone on your same federal income tax return if you file one. See page 1 for more information about who to include. If you don't file a tax return, remember to still add family members who live with you.

1. First name, Middle name, Last name, & Suffix

2. Relationship to you? **SELF**

3. Date of birth (mm/dd/yyyy)

4. Sex ☐ Male ☐ Female

5. Social Security number (SSN) - -

We need this if you want health coverage and have an SSN. Providing your SSN can be helpful if you don't want health coverage too since it can speed up the application process. We use SSNs to check income and other information to see who's eligible for help with health coverage costs. If someone wants help getting an SSN, call 1-800-772-1213 or visit socialsecurity.gov. TTY users should call 1-800-325-0778.

6. **Do you plan to file a federal income tax return NEXT YEAR?**
(You can still apply for health insurance even if you don't file a federal income tax return.)

☐ YES. **If yes,** please answer questions a-c. ☐ NO. **If no,** skip to question c

a. Will you file jointly with a spouse? ☐ Yes ☐ No

If yes, name of spouse:

b. Will you claim any dependents on your tax return? ☐ Yes ☐ No

If yes, list name(s) of dependents:

c. Will you be claimed as a dependent on someone's tax return? ☐ Yes ☐ No

If yes, please list the name of the tax filer:

How are you related to the tax filer?

7. Are you pregnant? ☐ Yes ☐ No a. **If yes,** how many babies are expected during this pregnancy? Expected Due Date ____

8. **Do you need health coverage?**
(Even if you have insurance, there might be a program with better coverage or lower costs.)

☐ YES. **If yes,** answer all the questions below.

☐ NO. **If no,** SKIP to the income questions on page 3. Leave the rest of this page blank.

9. Do you have a physical, mental, or emotional health condition that causes limitations in activities (like bathing, dressing, daily chores, etc) or live in a medical facility or nursing home? ☐ Yes ☐ No Do you have a disability? ☐Yes ☐No

10. Are you a U.S. citizen or U.S. national? ☐ Yes ☐ No

11. **If you aren't a U.S. citizen or U.S. national,** do you have eligible immigration status?
☐ Yes. Fill in your document type and ID number below.

a. Immigration document type

b. Document ID number

c. Have you lived in the U.S. since 1996? ☐ Yes ☐ No

d. Are you, or your spouse or parent a veteran or an active-duty member of the U.S. military? ☐ Yes ☐ No

e. I am a citizen of the Federated States of Micronesia, the Republic of the Marshall Islands, and Palau. ☐Yes ☐No

12. Do you want help paying for medical bills from the last 3 months? ☐ Yes ☐ No

13. Do you live with at least one child under the age of 19, and are you the main person taking care of this child? ☐ Yes ☐ No

~~14. Are you a full-time student? ☐ Yes ☐ No~~

15. Were you in foster care at age 18 or older (in Hawaii)? ☐ Yes ☐ No

16. **If Hispanic/Latino, ethnicity (OPTIONAL—check all that apply.)**
☐ Mexican ☐ Mexican American ☐ Chicano/a ☐ Puerto Rican ☐ Cuban ☐ Other

17. **Race (OPTIONAL—check all that apply.)**

☐ White	☐ American Indian or Alaska Native	☐ Filipino	☐ Vietnamese	☐ Guamanian or Chamorro
☐ Black or African American	☐ Asian Indian	☐ Japanese	☐ Other Asian	☐ Samoan
	☐ Chinese	☐ Korean	☐ Native Hawaiian	☐ Other Pacific Islander
				☐ Other

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX** ~~Para obtener una copia de este formulario en Español, llame 1-800-XXX-XXXX~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**

STEP 2: PERSON 1 (Continue with yourself)

Current Job & Income Information

☐ **Employed**
If you're currently employed, tell us about your income. Start with question 18.

☐ **Not employed**
Skip to question 28

☐ **Self-employed**
Skip to question 27.

CURRENT JOB 1:

18. Employer name and address

19. Employer phone number
( ) -

20. Wages/tips (before taxes) ☐ Hourly ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Monthly ☐ Yearly

$

21. Average hours worked each WEEK

CURRENT JOB 2: (If you have more jobs and need more space, attach another sheet of paper.)

22. Employer name and address

23. Employer phone number
( ) -

24. Wages/tips (before taxes) ☐ Hourly ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Monthly ☐ Yearly

$

25. Average hours worked each WEEK

26. **In the past year, did you:** ☐ Change jobs ☐ Stop working ☐ Start working fewer hours ☐ None of these

27. **If self-employed, answer the following questions:**

a. Type of work

b. How much net income (profits once business expenses are paid) will you get from this self-employment this month?

$

28 **OTHER INCOME THIS MONTH:** Check all that apply, and give the amount and how often you get it

NOTE: You don't need to tell us about child support, veteran's payment, or Supplemental Security Income (SSI)

☐ None

☐ Unemployment $ How often?

☐ Pensions $ How often?

☐ Social Security $ How often?

☐ Retirement accounts $ How often?

☐ Alimony received $ How often?

☐ Net farming/fishing $ How often?

☐ Net rental/royalty $ How often?

☐ Other income $ How often?
Type:

29 **DEDUCTIONS:** Check all that apply, and give the amount and how often you get it.

If you pay for certain things that can be deducted on a federal income tax return, telling us about them could make the cost of health coverage a little lower.

NOTE: You shouldn't include a cost that you already considered in your answer to net self-employment (question 27b)

☐ Alimony paid $ How often?

☐ Student loan interest $ How often?

☐ Other deductions $ How often?
Type:

30 **YEARLY INCOME:** **Complete only if your income changes from month to month.**
If you don't expect changes to your monthly income, skip to the next person.

Your total income **this year**	Your total income **next** year (if you think it will be different)
$	$

THANKS! This is all we need to know about you.

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX** ~~Para obtener una copia de este formulario en Español, llame **1-800-XXX-XXXX**~~. If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**.

STEP 2: PERSON 2

Complete Step 2 for yourself, your spouse/partner, and children who live with you and/or anyone on your same federal income tax return if you file one. See page 1 for more information about who to include. If you don't file a tax return, remember to still add family members who live with you.

1. First name, Middle name, Last name, & Suffix | 2. Relationship to you?

3. Date of birth (mm/dd/yyyy) | 4. Sex ☐ Male ☐ Female

5. Social Security number (SSN) - -
We need this if you want health coverage and have an SSN.

6. Does PERSON 2 live at the same address as you? ☐ Yes ☐ No

If no, list address:

7. **Does PERSON 2 plan to file a federal income tax return NEXT YEAR?**
(You can still apply for health insurance even if you don't file a federal income tax return.)

☐ YES. **If yes,** please answer questions a-c. ☐ NO. **If no,** skip to question c.

a. Will PERSON 2 file jointly with a spouse? ☐ Yes ☐ No

If yes, name of spouse:

b. Will PERSON 2 claim any dependents on his or her tax return? ☐ Yes ☐ No

If yes, list name(s) of dependents:

c. Will PERSON 2 be claimed as a dependent on someone's tax return? ☐ Yes ☐ No

If yes, please list the name of the tax filer:

How is PERSON 2 related to the tax filer?

8. Is PERSON 2 pregnant? ☐ Yes ☐ No a. **If yes,** how many babies are expected during this pregnancy? Expected Due Date

9. **Does PERSON 2 need health coverage?**
(Even if they have insurance, there might be a program with better coverage or lower costs.)

☐ YES. **If yes,** answer all the questions below. ☐ NO. **If no,** SKIP to the income questions on page 5. Leave the rest of this page blank.

10. Does PERSON 2 have a physical, mental, or emotional health condition that causes limitations in activities (like bathing, dressing, daily chores, etc) or live in a medical facility or nursing home? ☐ Yes ☐ No Does PERSON 2 have a disability? ☐ Yes ☐ No

11. Is PERSON 2 a U.S. citizen or U.S. national? ☐ Yes ☐ No

12. **If PERSON 2 isn't a U.S. citizen or U.S. national,** do they have eligible immigration status?

☐ Yes Fill in their document type and ID number below.

a. Document type b. Document ID number

c. Has PERSON 2 lived in the U.S. since 1996? ☐ Yes ☐ No d. Is PERSON 2, or their spouse or parent a veteran or an active-duty member in the U.S. military? ☐ Yes ☐ No

e. PERSON 2 is a citizen of The Federated States of Micronesia, The Republic of The Marshall Islands, and Palau. ☐ Yes ☐ No

13. Does PERSON 2 want help paying for medical bills from the last 3 months? ☐ Yes ☐ No

14. Does PERSON 2 live with at least one child under the age of 19, and are they the main person taking care of this child? ☐ Yes ☐ No

15. Was PERSON 2 in foster care at age 18 or older in Hawaii? ☐ Yes ☐ No

Please answer the following questions if PERSON 2 is 22 or younger:

16. Did PERSON 2 have insurance through a job and lose it within the past 3 months? ☐ Yes ☐ No

a. **If yes,** end date: b. Reason the insurance ended:

~~17. Is PERSON 2 a full-time student? ☐ Yes ☐ No~~

18. **If Hispanic/Latino, ethnicity (OPTIONAL—check all that apply.)**

☐ Mexican ☐ Mexican American ☐ Chicano/a ☐ Puerto Rican ☐ Cuban ☐ Other

19. **Race (OPTIONAL—check all that apply.)**

☐ White	☐ American Indian or Alaska Native	☐ Filipino	☐ Vietnamese	☐ Guamanian or Chamorro
☐ Black or African American	☐ Asian Indian	☐ Japanese	☐ Other Asian	☐ Samoan
	☐ Chinese	☐ Korean	☐ Native Hawaiian	☐ Other Pacific Islander
				☐ Other

Now, tell us about any income from PERSON 2 on the back.

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX** ~~Para obtener una copia de este formulario en Español, llame **1-800-XXX-XXXX**.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**.

STEP 2: PERSON 2

Current Job & Income Information

☐ **Employed**
If you're currently employed, tell us about your income. Start with question 20.

☐ **Not employed**
Skip to question 30.

☐ **Self-employed**
Skip to question 29.

CURRENT JOB 1:

20 Employer name and address

21 Employer phone number
( ) -

22 Wages/tips (before taxes) ☐ Hourly ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Monthly ☐ Yearly

$

23 Average hours worked each WEEK

CURRENT JOB 2: (If you have more jobs and need more space, attach another sheet of paper.)

24. Employer name and address

25 Employer phone number
( ) -

26. Wages/tips (before taxes) ☐ Hourly ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Monthly ☐ Yearly

$

27 Average hours worked each WEEK

28. **In the past year, did PERSON 2:** ☐ Change jobs ☐ Stop working ☐ Start working fewer hours ☐ None of these

29 **If self-employed, answer the following questions:**

a Type of work

b. How much net income (profits once business expenses are paid) will you get from this self-employment this month?

$

30. **OTHER INCOME THIS MONTH:** Check all that apply, and give the amount and how often you get it.

NOTE: You don't need to tell us about child support, veteran's payment, or Supplemental Security Income (SSI).

☐ None

☐ Unemployment $ How often?

☐ Pensions $ How often?

☐ Social Security $ How often?

☐ Retirement accounts $ How often?

☐ Alimony received $ How often?

☐ Net farming/fishing $ How often?

☐ Net rental/royalty $ How often?

☐ Other income $ How often?
Type

31 **DEDUCTIONS:** Check all that apply, and give the amount and how often you get it.

If PERSON 2 pays for certain things that can be deducted on a federal income tax return, telling us about them could make the cost of health coverage a little lower.

NOTE: You shouldn't include a cost that you already considered in your answer to net self-employment (question 29b).

☐ Alimony paid $ How often?

☐ Student loan interest $ How often?

☐ Other deductions $ How often?
Type:

32 **YEARLY INCOME: Complete only if PERSON 2's income changes from month to month.**

If you do not expect changes to PERSON 2 (pages 4 and 5) and complete.

PERSON 2's total income **this year**	PERSON 2's total income **next year** (if you think it will be different)
$	$

THANKS! This is all we need to know about PERSON 2.

If you have more than two people to include, make a copy of Step 2: Person 2 (pages 4 and 5) and complete.

? NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX** ~~Para obtener una copia de este formulario en Español, llame **1-800-XXX-XXXX**.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**.

STEP 3 American Indian or Alaska Native (AI/AN) family member(s)

1. **Are you or is anyone in your family American Indian or Alaska Native?**

☐ If **No,** skip to Step 4.

☐ **Yes. If yes,** go to Appendix B.

STEP 4 Your Family's Health Coverage

Answer these questions for anyone who needs health coverage.

1. **Is anyone enrolled in health coverage now from the following?**

☐ YES. **If yes,** check the type of coverage and write the person(s)' name(s) next to the coverage they have. ☐ NO.

- ☐ Medicaid
- ☐ CHIP
- ☐ Medicare
- ☐ TRICARE (Don't check if you have direct care or Line of Duty)
- ☐ VA health care programs
- ☐ Peace Corps
- ☐ Employer insurance
  - Name of health insurance:
  - Policy number:
  - Is this COBRA coverage? ☐ Yes ☐ No
  - Is this a retiree health plan? ☐ Yes ☐ No
- ☐ Other
  - Name of health insurance.
  - Policy number:
  - Is this a limited-benefit plan (like a school accident policy)? ☐ Yes ☐ No

2. **Is anyone listed on this application offered health coverage from a job?** Check yes even if the coverage is from someone else's job, such as a parent or spouse.

☐ YES. **If yes,** you'll need to complete and include Appendix A. Is this a state employee benefit plan? ☐ Yes ☐ No

☐ NO. **If no, continue to Step 5.**

PRA Disclosure Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-XXXX. The time required to complete this information collection is estimated to average (Insert Time (hours or minutes)) per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX**. ~~Para obtener una copia de este formulario en Español, llame 1-800-XXX-XXXX.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**.

STEP 5 Read & sign this application.

- I'm signing this application under penalty of perjury which means I've provided true answers to all the questions on this form to the best of my knowledge. I know that I may be subject to penalities under federal law if I provide false and or untrue information.
- I know that I must tell the Health Insurance Marketplace if anything changes (and is different than) what I wrote on this application. I can visit **HealthCare.gov** or call **1-800-XXX-XXXX** to report any changes. I understand that a change in my information could affect the eligibility for member(s) of my household.
- I know that under federal law, discrimination isn't permitted on the basis of race, color, national origin, sex, age, sexual orientation, gender identity, or disability. I can file a complaint of discrimination by visiting **www.hhs.gov/ocr/office/file.**
- I confirm that no one applying for health insurance on this application is incarcerated (detained or jailed). If not, _____ is incarcerated.
  (name of person)

We need this information to check your eligibility for help paying for health coverage if you choose to apply. We'll check your answers using information in our electronic databases and databases from the Internal Revenue Service (IRS), Social Security, the Department of Homeland Security, and/or a consumer reporting agency. If the information doesn't match, we may ask you to send us proof.

Renewal of coverage in future years

To make it easier to determine my eligibility for help paying for health coverage in future years, I agree to allow the Marketplace to use income data, including information from tax returns. The Marketplace will send me a notice, let me make any changes, and I can opt out at any time.

Yes, renew my eligibility automatically for the next

☐ 5 years (the maximum number of years allowed), or for a shorter number of years:

☐ 4 years ☐ 3 years ☐ 2 years ☐ 1 year ☐ Don't use information from tax returns to renew my coverage.

If anyone on this application is eligible for Medicaid

- I am giving to the Medicaid agency our rights to pursue and get any money from other health insurance, legal settlements, or other third parties. I am also giving to the Medicaid agency rights to pursue and get medical support from a spouse or parent.
- Does any child on this application have a parent living outside of the home? ☐ Yes ☐ No
- If yes, I know I will be asked to cooperate with the agency that collects medical support from an absent parent. If I think that cooperating to collect medical support will harm me or my children, I can tell Medicaid and I may not have to cooperate.

My right to appeal

If I think the Health Insurance Marketplace or Medicaid/Children's Health Insurance Program (CHIP) has made a mistake, I can appeal its decision. To appeal means to tell someone at the Health Insurance Marketplace or Medicaid/CHIP that I think the action is wrong, and ask for a fair review of the action. I know that I can find out how to appeal by contacting the Marketplace at **1-800-XXX-XXXX**. I know that I can be represented in the process by someone other than myself. My eligibility and other important information will be explained to me.

Sign this application. The person who filled out Step 1 should sign this application. If you're an authorized representative you may sign here, as long as you have provided the information required in Appendix C.

Signature	Date (mm/dd/yyyy)

STEP 6 Mail completed application.

Mail your signed application to:

Ted

Health Insurance Marketplace
1005 XYZ Drive
Washington, DC 20005

If you want to register to vote, you can complete a voter registration form at XXXXX.gov.

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX**. ~~Para obtener una copia de este formulario en Español, llame **1-800-XXX-XXXX**.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**.

APPENDIX A

Health Coverage from Jobs

You **DON'T** need to answer these questions unless someone in the household is eligible for health coverage from a job. Attach a copy of this page for each job that offers coverage.

Tell us about the **job** that offers coverage.

Take the Employer Coverage Tool on the next page to the employer who offers coverage to help you answer these questions. You only need to include this page when you send in your application, not the Employer Coverage Tool.

EMPLOYEE Information

1. Employee name (First, Middle, Last)	2. Employee Social Security number
	- -

EMPLOYER Information

3. Employer name		4. Employer Identification Number (EIN)
		-
5. Employer address		6. Employer phone number ( ) -
7. City	8. State	9. ZIP code
10. Who can we contact about employee health coverage at this job?		
11. Phone number (if different from above) ( ) -	12. Email address	

13. **Are you currently eligible for coverage offered by this employer, or will you become eligible in the next 3 months?**

☐ **Yes** (Continue)

13a. If you're in a waiting or probationary period, when can you enroll in coverage? (mm/dd/yyyy)

List the names of anyone else who is eligible for coverage from this job.

Name: Name: Name:

☐ **No** (Stop here and go to Step 5 in the application)

Tell us about the **health plan** offered by this employer.

14. Does the employer offer a health plan that meets the minimum value standard*? ☐ Yes ☐ No

15. For the lowest-cost plan that meets the minimum value standard* offered **only to the employee** (don't include family plans): If the employer has wellness programs, provide the premium that the employee would pay if he/ she received the maximum discount for any tobacco cessation programs, and did not receive any other discounts based on wellness programs.

a. How much would the employee have to pay in premiums for this plan? $

b. How often? ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Quarterly ☐ Yearly

16. What change will the employer make for the new plan year (if known)?

☐ Employer won't offer health coverage

☐ Employer will start offering health coverage to employees or change the premium for the lowest-cost plan available only to the employee that meets the minimum value standard * (Premium should reflect the discount for wellness programs. See question 15.)

a. How much will the employee have to pay in premiums for that plan? $

b. How often? ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Quarterly ☐ Yearly

Date of change (mm/dd/yyyy):

*An employer-sponsored health plan meets the "minimum value standard" if the plan's share of the total allowed benefit costs covered by the plan is no less than 60 percent of such costs (Section 36B(c)(2)(C)(ii) of the Internal Revenue Code of 1986)

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EMPLOYER COVERAGE TOOL

Health Insurance Marketplace

Use this tool to help answer questions in Appendix A about any employer health coverage that you're eligible for (even if it's from another person's job, like a parent or spouse). The information in the numbered boxes below match the boxes on Appendix A. For example, the answer to question 14 on this page should match question 14 on Appendix A.

Write your name and Social Security number in boxes 1 and 2 and ask the employer to fill out the rest of the form. Complete one tool for each employer that offers health coverage.

EMPLOYEE Information

The **employee** needs to fill out this section.

1. Employee name (First, Middle, Last)	2. Social Security Number - -

EMPLOYER Information

Ask the **employer** for this information.

3. Employer name	4. Employer Identification Number (EIN) __ __ - __ __ __ __ __ __ __
5. Employer address (the Marketplace will send notices to this address)	6. Employer phone number ( ) -

7. City	8. State	9. ZIP code

10. Who can we contact about employee health coverage at this job?

11. Phone number (if different from above) ( ) -	12. Email address

13. **Is the employee currently eligible for coverage offered by this employer, or will the employee be eligible in the next 3 months?**

☐ **Yes** (Continue)

13a. If the employee is not eligible today, including as a result of a waiting or probationary period, when is the employee eligible for coverage? ____ ____ ____ (mm/dd/yyyy) (Continue)

☐ **No** (STOP and return this form to employee)

Tell us about the **health plan** offered by this **employer**.

Does the employer offer a health plan that covers an employee's spouse or dependent?

☐ Yes. Which people? ☐ Spouse ☐ Dependent(s)

☐ No

(Go to question 14)

14. Does the employer offer a health plan that meets the minimum value standard*?

☐ Yes (Go to question 15) ☐ No (STOP and return form to employee)

15. For the lowest-cost plan that meets the minimum value standard* offered **only to the employee** (don't include family plans): If the employer has wellness programs, provide the premium that the employee would pay if he/ she received the maximum discount for any tobacco cessation programs, and didn't receive any other discounts based on wellness programs.

a. How much would the employee have to pay in premiums for this plan? $ _____

b. How often? ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Quarterly ☐ Yearly

If the plan year will end soon and you know that the health plans offered will change, go to question 16. If you don't know, STOP and return form to employee.

16. What change will the employer make for the new plan year?

☐ Employer won't offer health coverage

☐ Employer will start offering health coverage to employees or change the premium for the lowest-cost plan available only to the employee that meets the minimum value standard.* (Premium should reflect the discount for wellness programs. See question 15.)

a. How much will the employee have to pay in premiums for that plan? $ ____

b. How often? ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Quarterly ☐ Yearly

Date of change (mm/dd/yyyy): ____ ____ ____

*An employer-sponsored health plan meets the "minimum value standard" if the plan's share of the total allowed benefit costs covered by the plan is no less than 60 percent of such costs (Section 36B(c)(2)(C)(ii) of the Internal Revenue Code of 1986)

NEED HELP WITH YOUR APPLICATION? Visit **HealthCare.gov** or call us at 1-800-XXX-XXXX. ~~Para obtener una copia de este formulario en Español, llame 1-800-XXX-XXXX.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**

APPENDIX B

American Indian or Alaska Native Family Member (AI/AN)

Complete this appendix if you or a family member are American Indian or Alaska Native. Submit this with your Application for Health Coverage & Help Paying Costs.

Tell us about your American Indian or Alaska Native family member(s).

American Indians and Alaska Natives can get services from the Indian Health Services, tribal health programs, or urban Indian health programs. They also may not have to pay cost sharing and may get special monthly enrollment periods. Answer the following questions to make sure your family gets the most help possible.

NOTE: If you have more people to include, make a copy of this page and attach

	AI/AN PERSON 1	AI/AN PERSON 2
1 Name (First name, Middle name, Last name)	First Middle Last	First Middle Last
2 Member of a federally recognized tribe?	☐ Yes **If yes**, tribe name ☐ No	☐ Yes **If yes**, tribe name ☐ No
3. Has this person ever gotten a service from the Indian Health Service, a tribal health program, or urban Indian health program, or through a referral from one of these programs?	☐ Yes ☐ No **If no**, is this person eligible to get services from the Indian Health Service, tribal health programs, or urban Indian health programs, or through a referral from one of these programs? ☐ Yes ☐ No	☐ Yes ☐ No **If no**, is this person eligible to get services from the Indian Health Service, tribal health programs, or urban Indian health programs, or through a referral from one of these programs? ☐ Yes ☐ No
4 Certain money received may not be counted for Medicaid or the Children's Health Insurance Program (CHIP). List any income (amount and how often) reported on your application that includes money from these sources: • Per capita payments from a tribe that come from natural resources, usage rights, leases, or royalties • Payments from natural resources, farming, ranching, fishing, leases, or royalties from land designated as Indian trust land by the Department of Interior (including reservations and former reservations) • Money from selling things that have cultural significance	$ How often?	$ How often?

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APPENDIX C

Assistance with Completing this Application

You can choose an authorized representative.

You can give a trusted person permission to talk about this application with us, see your information, and act for you on matters related to this application, including getting information about your application and signing your application on your behalf. This person is called an "authorized representative." If you ever need to change your authorized representative, contact the Marketplace. If you're a legally appointed representative for someone on this application, submit proof with the application.

1. Name of authorized representative (First name, Middle name, Last name)

2. Address		3. Apartment or suite number
4. City	5. State	6. ZIP code
7. Phone number ( ) -		
8. Organization name		9. ID number (if applicable)

By signing, you allow this person to sign your application, get official information about this application, and act for you on all future matters with this agency.

10. Your signature	11. Date (mm/dd/yyyy)

For certified application counselors, navigators, agents, and brokers only.

Complete this section if you're a certified application counselor, navigator, agent, or broker filling out this application for somebody else.

1. Application start date (mm/dd/yyyy)

2. First name, Middle name, Last name, & Suffix

3. Organization name	4. ID number (if applicable)

NEED HELP WITH YOUR APPLICATION? Visit **HealthCare.gov** or call us at **1-800-XXX-XXXX**. ~~Para obtener una copia de este formulario en Español, llame **1-800-XXX-XXXX**.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**.

Health Insurance Marketplace

TBD

HealthCare.gov → mybenefits.hawaii.gov
1-800-XXX-XXXX → 1-877-628-5076

PLEASE REFER TO ATTACHMENT 3

Application for Health Coverage & Help Paying Costs (Short Form)

THINGS TO KNOW

Use this application to see what coverage you qualify for

- Affordable private health insurance plans that offer comprehensive coverage to help you stay well
- A new tax credit that can immediately help pay your premiums for health coverage
- Free or low-cost insurance from Medicaid or the Children's Health Insurance Program (CHIP)

Who can use this application?

Single adults who:

- Aren't offered health coverage from their employer
- Don't have any dependents and can't be claimed as a dependent on someone else's tax return

NOTE: If any of the following apply, you need to fill out a different form to make sure you get the most benefits possible:

- You're married or have dependent children.
- You were in the foster care system, and you're under age 26.
- You have items that can be deducted from your income. If your only deduction is student loan interest, you **can** use this form.
- You're American Indian or Alaska Native.
- You have special circumstances that require additional services and/or benefits.

Apply faster online

Apply faster online at HealthCare.gov.

What you may need to apply

- Your Social Security number (or document number if you're a legal immigrant)
- Employer and income information (for example, from paystubs, W-2 forms, or wage and tax statements)

Why do we ask for this information?

We ask about income and other information to let you know what coverage you qualify for and if you can get any help paying for it. **We'll keep all the information you provide private, as required by law.**

What happens next?

Send your complete, signed application to the address on page 3. **If you don't have all the information we ask for, sign and submit your application anyway.** We'll follow up with you within 1-2 weeks. Filling out this application doesn't mean you have to buy health coverage.

Get help with this application

- **Online:** HealthCare.gov.
- **Phone:** Call our Help Center at **1-800-XXX-XXXX.**
- **In person:** There may be counselors in your area who can help. Visit HealthCare.gov, or call **1-800-XXX-XXXX** for more information.
- ~~**En Español:** Llame a nuestro centro de ayuda gratis al **1-800-XXX-XXXX.**~~

NEED HELP WITH YOUR APPLICATION? Visit HealthCare.gov or call us at **1-800-XXX-XXXX**. ~~Para obtener una copia de este formulario en Español, llame **1-800-XXX-XXXX.**~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**

STEP 1 Tell us about yourself.

1. First name, Middle name, Last name, & Suffix

2. Home address (Leave blank if you don't have one.) | 3. Apartment or suite number

4. City | 5. State | 6. Zip code | 7. County

8. Mailing address (if different from home address) | 9. Apartment or suite number

10. City | 11. State | 12. ZIP code | 13. County

14. Phone number ( ) - | 15. Other phone number ( ) -

16. Do you want to get information about this application by email? ☐ Yes ☐ No

Email address:

17. Preferred spoken or written language (if not English)

18. Date of birth (mm/dd/yyyy) | 19. Sex ☐ Male ☐ Female

20. Social Security number (SSN) - -

We need this if you want health coverage and have an SSN. We use SSNs to check income and other information to see if you're eligible for help with health coverage costs. If you need help getting an SSN, call 1-800-772-1213 or visit socialsecurity.gov. TTY users should call 1-800-325-0778.

21. Are you a U.S. citizen or U.S. national? ☐ Yes ☐ No

22. **If you aren't a U.S. citizen or U.S. national,** do you have eligible immigration status?

☐ Yes Fill in your document type and ID number below

a. Immigration document type

b. Document ID number

c. Have you lived in the U.S. since 1996? ☐ Yes ☐ No

d. Are you a veteran or an active-duty member of the U.S. military? ☐ Yes ☐ No

~~O. I am a citizen of the Federated States of Micronesia, the Republic of the Marshall Islands, and Palau.~~ O Yes O No

23. Are you pregnant? ☐ Yes ☐ No

If yes, how many babies are expected during this pregnancy? Expected Due Date _____

24. Do you have a physical, mental, or emotional health condition that causes limitations in activities (like bathing, dressing, daily chores, etc.) or live in a medical facility or nursing home? ☐ Yes ☐ No Do you have a disability? O Yes O No

25. **If Hispanic/Latino, ethnicity (OPTIONAL—check all that apply.)**

☐ Mexican ☐ Mexican American ☐ Chicano/a ☐ Puerto Rican ☐ Cuban ☐ Other

26. **Race (OPTIONAL—check all that apply.)**

☐ White	☐ American Indian or Alaska Native	☐ Filipino	☐ Vietnamese	☐ Guamanian or Chamorro
☐ Black or African American	☐ Asian Indian	☐ Japanese	☐ Other Asian	☐ Samoan
	☐ Chinese	☐ Korean	☐ Native Hawaiian	☐ Other Pacific Islander
				☐ Other

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STEP 2 Current job & income information

☐ **Employed** – If you're currently employed, tell us about your income. Start with question 1.

☐ **Not Employed** – Skip to question 11. ☐ **Self Employed** – Skip to question 10.

CURRENT JOB 1:

1. Employer name and address	2. Employer phone number	3. Average hours worked each week
	( ) –	

4. Wages/tips (before taxes) ☐ Hourly ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Monthly ☐ Yearly

$

CURRENT JOB 2: (If you have more jobs and need more space, attach another sheet of paper)

5. Employer name and address	6. Employer phone number	7. Average hours worked each week
	( ) –	

8. Wages/tips (before taxes) ☐ Hourly ☐ Weekly ☐ Every 2 weeks ☐ Twice a month ☐ Monthly ☐ Yearly

$

9. **In the past year, did you:** ☐ Change jobs ☐ Stop working ☐ Start working fewer hours ☐ None of these

10. **If self-employed, answer the following questions:**

a. Type of work

b. How much net income (profits once business expenses are paid) will you get from this self-employment this month?

$

11. **OTHER INCOME THIS MONTH:** Check all that apply, and give the amount and how often **you** get it

NOTE: You don't need to tell us about child support, veteran's payment, or Supplemental Security Income (SSI)

☐ None

☐ Unemployment $ How often?

☐ Pensions $ How often?

☐ Social Security $ How often?

☐ Retirement accounts $ How often?

☐ Alimony received $ How often?

☐ Net farming/fishing $ How often?

☐ Other income $ How often?

Type

12. Do you pay student loan interest (not the amount of the loan) that can be deducted on a federal income tax return?

☐ YES. **If yes,** how much $ How often? ☐ NO.

13. **YEARLY INCOME:** Complete only if your income changes from month to month. If you don't expect changes to your monthly income, skip to step 3.

Your total income **this year**	Your total income **next year** (if you think it will be different)
$	$

STEP 3 Your health coverage

1. **Are you enrolled in health coverage now from any of the following?**

☐ YES. **If yes,** check which coverage you have ☐ NO.

☐ Medicaid
☐ CHIP
☐ Medicare
☐ TRICARE (don't check if you have Direct Care or Line of Duty)
☐ Peace Corps
☐ VA health care programs
☐ Other

Name of health insurance

Policy number

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STEP 4 Read & sign this application.

- I'm signing this application under penalty of perjury, which means I've provided true answers to all the questions on this form to the best of my knowledge. I know that I may be subject to penalties under federal law if I intentionally provide false or untrue information.
- I know that I must tell the Health Insurance Marketplace if anything changes (and is different than) what I wrote on this application. I can visit **HealthCare.gov** or call **1-800-XXX-XXXX** to report any changes. I understand that a change in my information could affect my eligibility.
- I know that under federal law, discrimination isn't permitted on the basis of race, color, national origin, sex, age, sexual orientation, gender identity, or disability. I can file a complaint of discrimination by visiting **www.hhs.gov/ocr/office/file**.
- I confirm that I'm not incarcerated (detained or jailed).
- I confirm that next year I expect to file a federal income tax return, won't claim dependents on that return, and can't be claimed as a dependent on anyone else's federal income tax return.
- I confirm that I'm not offered health coverage from an employer.

We need this information to check your eligibility for help paying for health coverage if you choose to apply. We'll check your answers using information in our electronic databases and databases from the Internal Revenue Service (IRS), Social Security, the Department of Homeland Security, and/or a consumer reporting agency. If the information doesn't match, we may ask you to send us proof.

Renewal of coverage in future years

To make it easier to determine my eligibility for help paying for health coverage in future years, I agree to allow the Marketplace to use income data, including information from tax returns. The Marketplace will send me a notice, let me make any changes, and I can opt out at any time.

Yes, renew my eligibility automatically for the next

☐ 5 years (the maximum number of years allowed), or for a shorter number of years:

☐ 4 years ☐ 3 years ☐ 2 years ☐ 1 year ☐ Don't use information from tax returns to renew my coverage.

If I'm eligible for Medicaid

If I enroll in Medicaid, I'm giving the Medicaid agency my rights to pursue and get any money from other health insurance, legal settlements, or other third parties.

My right to appeal

If I think the Marketplace or Medicaid/Children's Health Insurance Program (CHIP) has made a mistake, I can appeal its decision. To appeal means to tell someone at the Marketplace or Medicaid/CHIP that I think the action is wrong, and ask for a fair review of the action. I know that I can find out how to appeal by contacting the Marketplace at **1-800-XXX-XXXX**. I know that I can be represented in the process by someone other than myself. My eligibility and other important information will be explained to me.

Sign this application. The person who filled out Step 1 should sign this application. If you're an authorized representative, you may sign here as long as you have provided the information required in Appendix C.

Signature	Date (mm/dd/yyyy)

STEP 5 Mail completed application.

Mail your signed application to:

TBD
Health Insurance Marketplace
1005 XYZ Drive
Washington, DC 20005

What happens next?

We'll follow up with you within 1-2 weeks. You'll get instructions on how to take the next steps to get your health coverage. If you don't hear from us within 2 weeks, visit **HealthCare.gov** or call **1-800-XXX-XXXX**.

If you want to register to vote, you can complete a voter registration form at **XXXXX.gov**.

PRA Disclosure Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-XXXX. The time required to complete this information collection is estimated to average [Insert Time (hours or minutes)] per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

APPENDIX C

Assistance with Completing this Application

You can choose an authorized representative.

You can give a trusted person permission to talk about this application with us, see your information, and act for you on matters related to this application, including getting information about your application and signing your application on your behalf. This person is called an "authorized representative." If you ever need to change your authorized representative, contact the Marketplace. If you're a legally appointed representative for someone on this application, submit proof with the application.

1. Name of authorized representative (First name, Middle name, Last name)

2. Address		3. Apartment or suite number
4. City	5. State	6. ZIP code
7. Phone number ( ) –		
8. Organization name		9. ID number (if applicable)

By signing, you allow this person to sign your application, get official information about this application, and act for you on all future matters with this agency.

10. Your signature	11. Date (mm/dd/yyyy)

For certified application counselors, navigators, agents, and brokers only.

Complete this section if you're a certified application counselor, navigator, agent, or broker filling out this application for somebody else.

1. Application start date (mm/dd/yyyy)

2. First name, Middle name, Last name, & Suffix

3. Organization name	4. ID number (if applicable)

NEED HELP WITH YOUR APPLICATION? Visit **HealthCare.gov** or call us at **1-800-XXX-XXXX**. ~~Para obtener una copia de este formulario en Español, llame 1-800-XXX-XXXX.~~ If you need help in a language other than English, call **1-800-XXX-XXXX** and tell the customer service representative the language you need. We'll get you help at no cost to you. TTY users should call **1-800-XXX-XXXX**