COVER MONTANA

What to Bring to Your Enrollment Appointment

A quick-reference checklist for Marketplace, Medicaid, and Medicare Savings Program appointments

Getting ready for your appointment helps your Navigator or Enrollment Assister make the most of your time together. Not every item below will apply to your situation — bring what you have, and we can help you track down anything that's missing.

EVERYONE - bring these items no matter what you're applying for	MARKETPLACE HealthCare.gov	MAGI MEDICAID apply.mt.gov	MSP / ABD MEDICAID Medicare Savings Programs
☐ Identifying information for household members, including names and birthdates	☐ Your HealthCare.gov username and password (if you have or create account before your appointment)	☐ Your apply.mt.gov username and password (if you have or create an account before your appointment)	☐ All applicable information from the MAGI Medicaid column
☐ Physical and mailing address, phone number, and email address where you can be reached	☐ Your estimated household income for the coverage year	☐ Proof of monthly household income	☐ Proof of monthly income (earned income, Social Security award letter, pension, or retirement statement)
☐ Social Security numbers for everyone who is applying for coverage	☐ A completed Employer Coverage Tool if anyone in your house offered job-based insurance	☐ Pregnancy status, if applicable	☐ Statements for all bank, checking, savings, and money market accounts
☐ Details on any current health coverage you receive (policy name and monthly cost)	☐ A list of your current healthcare providers and prescription medications	☐ School or educational enrollment information for household members	☐ Statements for stocks, bonds, CDs, IRAs, and burial funds/plots
☐ Immigration documents (Green Card, A Number, work permit, etc.) for anyone applying who is not a U.S. citizen			☐ Life insurance policy details (face value and cash value)
☐ Tribal affiliation or enrollment information, if applicable			☐ Vehicle information (year, make/model, value) if you own more than one vehicle

Before your appointment: if you can, create your HealthCare.gov and/or apply.mt.gov account ahead of time and confirm you can log in — this saves valuable time at your appointment.

Questions or need to reschedule? Call 844-682-6837 to reach a Cover Montana Navigator