CARPENTER COLLECTIVE, LLC
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Health Coverage Consultation Document Checklist

Use this checklist to prepare for an individual or family consultation about Marketplace, Medicaid, CHIP, Medicare, and healthcare financial-assistance options. Bring only documents relevant to your situation. Not every item is required for every application.

1 | Identity, citizenship & immigration documents

☐ For each applicant: full legal name, date of birth, current address, and Social Security number (if one has been issued and requested by the program).

☐ Photo identification: valid driver's license, state identification card, U.S. passport/passport card, or another accepted government-issued photo ID.

☐ Proof of U.S. citizenship, if verification is requested: U.S. passport, U.S. birth certificate (sometimes paired with other documentation), Certificate of Naturalization (N-550/N-570), or Certificate of Citizenship (N-560/N-561).

☐ Immigration documentation, if applicable: Permanent Resident Card/green card (I-551); Employment Authorization Document (I-766); foreign passport with qualifying visa or temporary I-551 stamp; I-94/I-94A; refugee travel document (I-571); reentry permit (I-327); or USCIS notice (I-797), as applicable.

☐ Other status records, if applicable: I-20, DS-2019, asylum/refugee-related records, or other documents and identification numbers specified in an official Marketplace request.

Verification requirements depend on the program and status. A document proves identity or status, but does not by itself establish eligibility for coverage or financial assistance. Check notices for the exact acceptable documents.

2 | Household and contact information

☐ Home and mailing addresses, phone number, email address, and preferred contact method.

☐ Names, birth dates, and relationships for household members, spouse, and tax dependents, including people who are not seeking coverage when relevant.

☐ Marital status, anticipated tax-filing status, and who expects to claim dependents for the coverage year.

☐ If applicable: custody or dependency arrangements, proof of address, and information about recent household changes.

3 | Income, employment & anticipated deductions

☐ Recent pay stubs (preferably showing year-to-date earnings), employer contact information, or a wage/employment letter.

☐ Self-employed/gig workers: current profit-and-loss summary, business income/expense records, and estimated annual net earnings.

☐ If applicable: Social Security award/benefit letters, unemployment statements, pension/retirement distributions, alimony records, and investment or rental income documentation.

☐ Most recent federal income tax return and applicable W-2/1099 forms, plus an estimate of current-year income and expected changes.

☐ Records for potentially applicable deductions or adjustments: e.g., eligible HSA/IRA contributions and student-loan interest; see the linked APTC checklist.

Interactive document: **Open Carpenter Collective's APTC Income & Deductions Checklist (PDF)**

Marketplace APTC generally uses projected annual household MAGI, while Medicaid income methods can differ by eligibility category and state. The linked APTC worksheet is labeled for 2026/Pennie; confirm the rules for your coverage year and state.

4 | Current coverage, providers and prescriptions

☐ Current insurance cards (Marketplace, employer, Medicaid, CHIP, Medicare, Part D, Medigap, dental, or vision, as relevant).

☐ Any eligibility, renewal, termination, nonrenewal, or employer-coverage notices; coverage end dates and COBRA information, if applicable.

☐ Current prescription list (drug name, dose, frequency, preferred pharmacy) and names of physicians, specialists, hospitals, and preferred facilities.

☐ If relevant to the consultation: recent healthcare bills, explanation of benefits (EOBs), or documentation of financial assistance already received.

5 | Additional items for Medicare, Medicaid or financial assistance

☐ Medicare card, Social Security or Railroad Retirement benefit information, and notices for Extra Help or Medicare Savings Programs.

☐ For Medicaid categories involving age, disability, or long-term care: resource/asset information and medical or functional eligibility records, only when relevant and requested.

☐ Hospital charity care or prescription assistance: billing statements, program applications, income evidence, and any denial or approval letters.

6 | Before your appointment

☐ Review the appointment confirmation and relevant program requests; note deadlines and questions you want answered.

☐ Share sensitive records only through an approved secure upload or at your appointment—not in public webinar chats or ordinary unencrypted messages.

☐ If you lack a document, still attend and ask which acceptable substitute or explanation may be used.

Useful official reference: HealthCare.gov: documents & deadlines | Immigration document types

Carpenter Collective resources: Health Consultation List | Coverage Prescreener

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Educational preparation checklist; not a guarantee of eligibility. Exact document requirements vary by program, state, individual circumstances, and any verification notice you receive.