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## JOB AID: SINGLE STREAMLINED APPLICATION

February 13, 2015

The Covered California Single Streamlined Application (SSA) supports all online applications, including Special Enrollment, Open Enrollment, Report a Change, and Re-application. The SSA is aligned with the paper application and provides online help to inform and improve the Consumer experience. This Job Aid provides an overview of the SSA, with a focus on highlighting new features and pages for Certified Insurance Agents (Agents), Certified Enrollment Counselors (CECs), County Eligibility Workers (CEWs), Plan Based Enrollers (PBEs), and Service Center Representatives (SCRs).

### For Agents, CECs, CEWs, PBEs and SCRs Only:

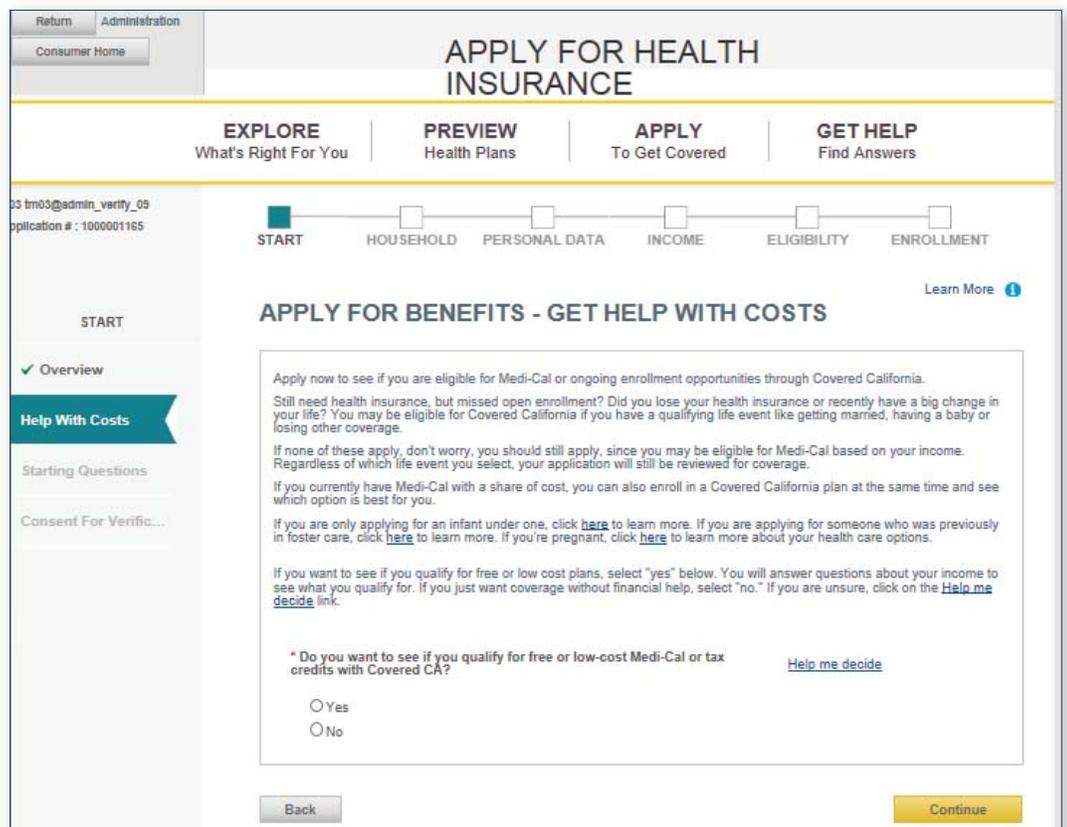
For users performing task displays in the upper left c For example, 'Administrat users with the Admin role) PBEs, and 'Insurance Age displays for Agents.



### Get Help with Costs

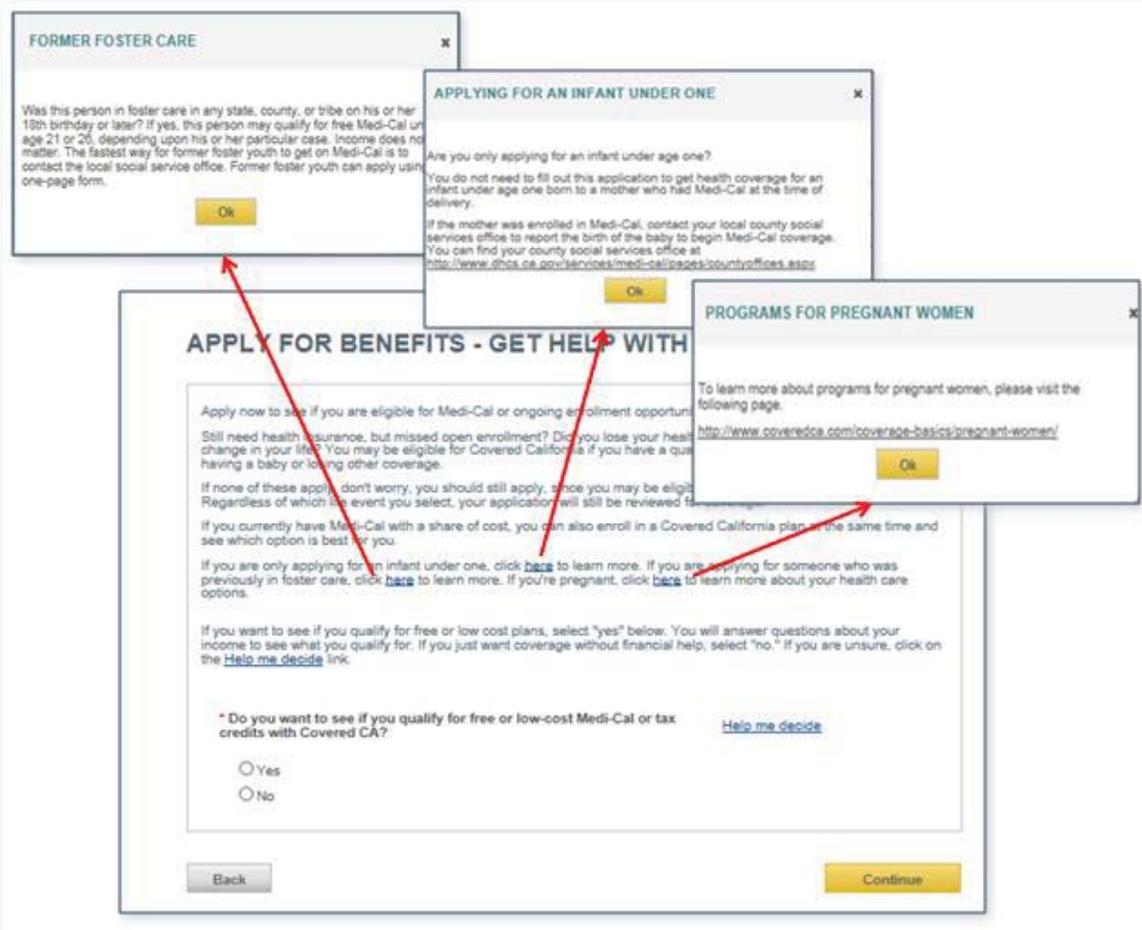
The Single Streamlined Application opens with the *new Apply for Benefits - Get Help With Costs* page.

The *Apply for Benefits - Get Help With Costs* page provides links to access information about help with costs and guides selection of the application type (either subsidized or unsubsidized) that best matches the Consumer's situation.



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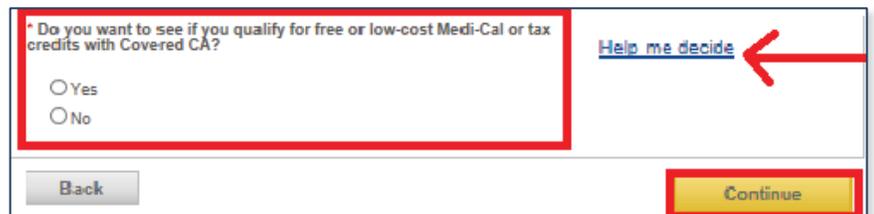
Clicking links on the *Apply for Benefits – Get Help With Costs* page allows the user to view popups with information about applications for Former Foster Care youth, applying for an infant under the age of one (Deemed Infants) and programs for pregnant women. Clicking a link on a popup opens a new window. Clicking the **OK** button on a popup closes the popup.



To begin an application, select either the **Yes** or **No** radio button, and then click the **Continue** button.

- Select the **Yes** radio button to begin a subsidized application.
- Select the **No** radio button to begin an unsubsidized application.

To help the user determine the application type (subsidized or unsubsidized) that best matches the Consumer's situation, an optional **Help Me Decide** feature is available to walkthrough the decision process. The **Help Me Decide** feature asks a series of questions that result in suggesting a Yes or No response for the question on the *Apply for Benefits – Get Help With Costs* page.



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Click the **Help Me Decide** link to view the first of set of interactive **panels**.

- **Help Me Decide – Panel 1**

Enter the zip code and the number of people in the household on the first **Help Me Decide** panel, and then click the **Next** button. **Note:** The household zip may be prepopulated from account creation.

- **Help Me Decide – Panel 2**

Select **Yes**, **No** or **I don't know** radio buttons on the second **Help Me Decide** panel to indicate whether the household income will be less than the amount shown, and then click the **Next** button.

**Note:** The amount of annual income shown on Panel 2 equals 420% of the Federal Poverty Level (FPL) for the household size and zip code entered in Panel 1.

- **Help Me Decide – Panel 3**

If the **Yes** radio button was selected on Panel 2, the third **Help Me Decide** panel appears with the following message: *'We encourage you to apply for help paying for health insurance. Based on what you have told us, you may be eligible for a \$0 premium plan or a new kind of tax credit that lowers your monthly premiums right away. To begin the application, select 'yes' on the next question.'* Click the **OK** button to return to the *Apply for Benefits – Get Help With Costs* page to select the application type and begin the application.

If the **No** radio button was selected on Panel 2, the third **Help Me Decide** panel appears with the following message: *'Based on what you told us, your income may be too high to get help paying for insurance. You can still get a good deal on insurance from Covered California and you won't pay higher costs for pre-existing conditions.'* Click the **OK** button to return to the *Apply for Benefits - Get Help With Costs* page to select the application type and begin the application.

If the **I don't know** radio button is selected on Panel 2, the third **Help Me Decide** panel appears with the following message: *'We encourage you to apply for help paying for health insurance. We will walk*

The screenshot shows the first panel of the 'HELP ME DECIDE' form. It contains two questions: 'What is your Zip code?' with a text input field containing '95816', and 'How many people are on your federal income tax return this year?' with a dropdown menu set to 'Select One'. At the bottom, there are three numbered steps (1, 2, 3) with step 1 highlighted, and 'Cancel' and 'Next' buttons.

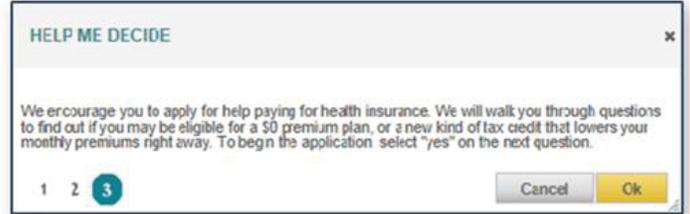
The screenshot shows the second panel of the 'HELP ME DECIDE' form. It contains one question: 'Do you think your total household income will be less than \$100170 this year?' with three radio button options: 'Yes', 'No', and 'I don't know'. At the bottom, there are three numbered steps (1, 2, 3) with step 2 highlighted, and 'Cancel' and 'Next' buttons.

The screenshot shows the third panel of the 'HELP ME DECIDE' form, which appears after selecting 'Yes' on Panel 2. It contains an encouraging message about applying for help. At the bottom, there are three numbered steps (1, 2, 3) with step 3 highlighted, and 'Cancel' and 'Ok' buttons.

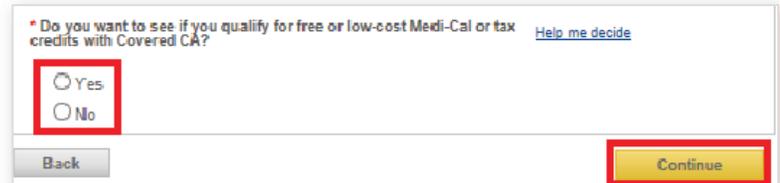
The screenshot shows the third panel of the 'HELP ME DECIDE' form, which appears after selecting 'No' on Panel 2. It contains a message about income being too high but still offering insurance options. At the bottom, there are three numbered steps (1, 2, 3) with step 3 highlighted, and 'Cancel' and 'Ok' buttons.

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you through questions to find out if you may be eligible for a \$0 premium plan, or a new kind of tax credit that lowers your monthly premiums right away. To begin the application, select "yes" on the next question.' Click the **OK** button to return to the *Apply for Benefits - Get Help With Costs* page to select the application type and begin the application.



Select either the **Yes** or **No** radio button on the *Apply for Benefits – Get Help with Costs* page, then click the **Continue** button to begin the application. The *Apply for Benefits* page appears.



**Note:** Clicking the **Continue** button before selecting either the **Yes** or **No** radio button results in the following error message on the *Apply for Benefits – Get Help With Costs* page: 'You must choose an option. To find out what option to select, click the *Help Me Decide* link.'

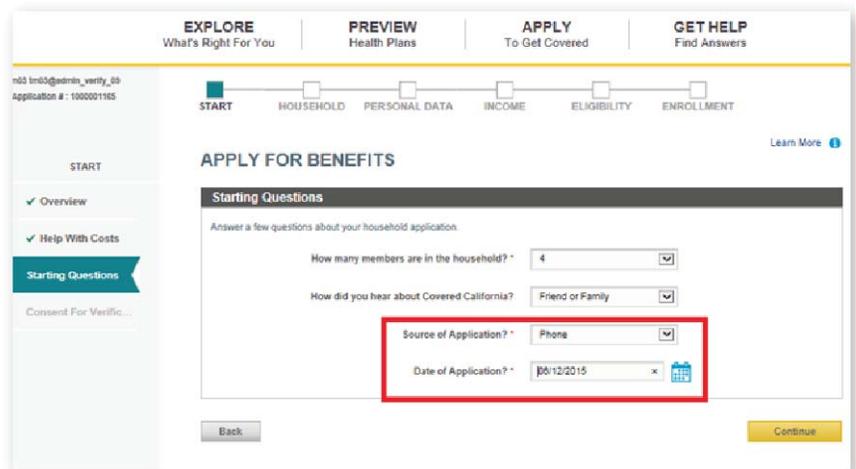


## Apply for Benefits Page

The *Apply for Benefits* page captures basic application information such as the number of members in the household.

### For Admin users, Agents, CECs, and PBEs Only:

The **Source of Application** (Email, Mail, Fax, or Phone), **Date of Application**, (and **Document ID** if the application source is Email, Mail, or Fax) fields display.



After these fields are completed as appropriate, clicking the **Continue** button navigates the user to the next page. **Note:** If the **Document ID** field is populated, the Document ID displays in the **Application Type** section on the *Application Review* page at the end of the application process.

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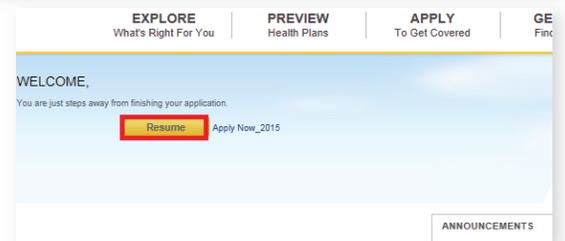
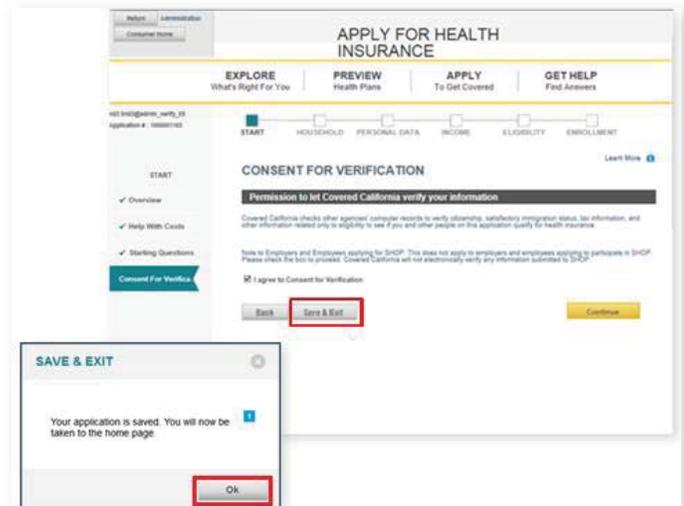
The *Consent for Verification* page is the next page in the application. Selecting the **I agree** checkbox and clicking the **Continue** button on the *Consent for Verification* page allows the user to proceed to the Household information pages of the application.

### Save and Exit

Keep in mind, clicking the **Save & Exit** button at the bottom of a page allows the user to save the application progress and exit.

Click the **OK** button on the **Save & Exit** popup that appears to return to the *Individual Home* page.

Click the **Resume** button on the *Individual Home* page to resume a saved application.

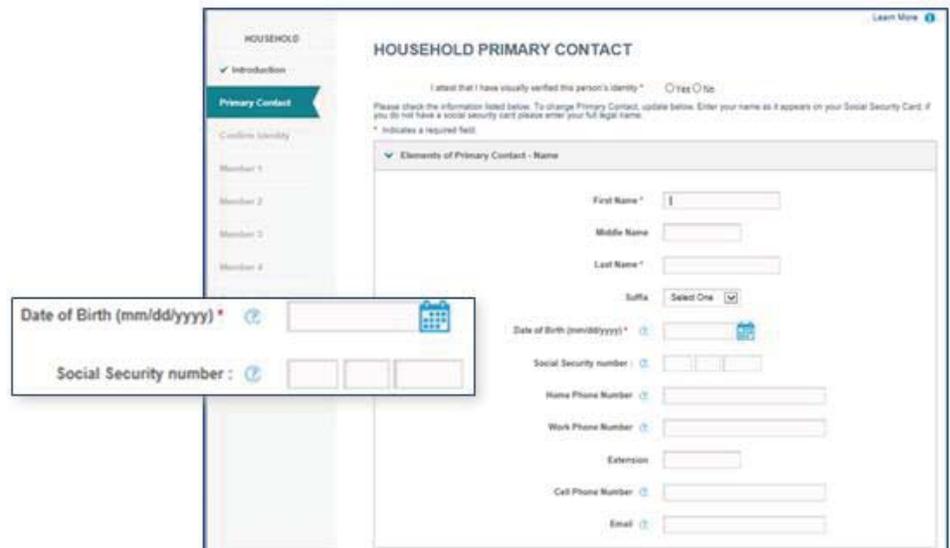


### Household Primary Contact Page

The *Household Primary Contact* page now displays the correct format for entering a Date of Birth (**mm/dd/yyyy**) and provides data collection textboxes to guide the entry of the Social Security number.

After the physical address information is entered and the user clicks the **Continue** button, the *Confirm Your Address* popup appears.

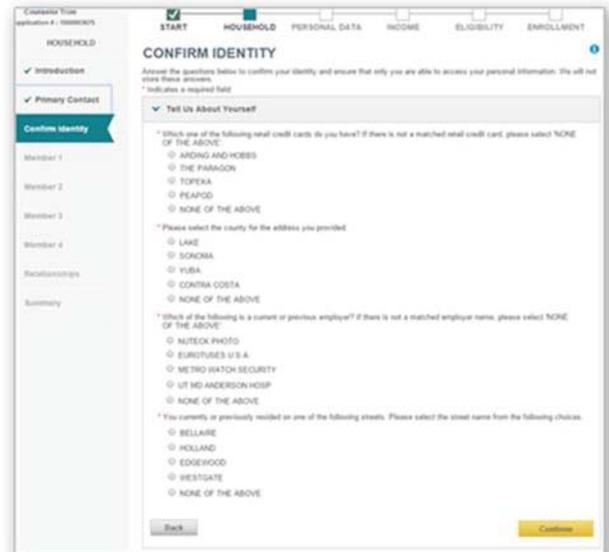
A message displays on the **Confirm Your Address** popup, based on the postal verification results. If the postal check confirms the address entered, the user clicks the **OK** button on the popup to continue. If the address is not confirmed, the user must select the closest match from a list of alternates, or correct any errors to continue with the application.



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If the option to use the Federal Hub to validate the Consumer's identity was selected, the *Confirm Identity* page appears once the *Household Primary Contact* page is completed.

Once the *Confirm Identity* page is completed, clicking the **Continue** button navigates the user to the *Household Member* page to enter information for each household member on the application.



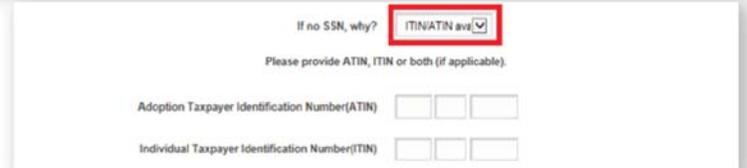
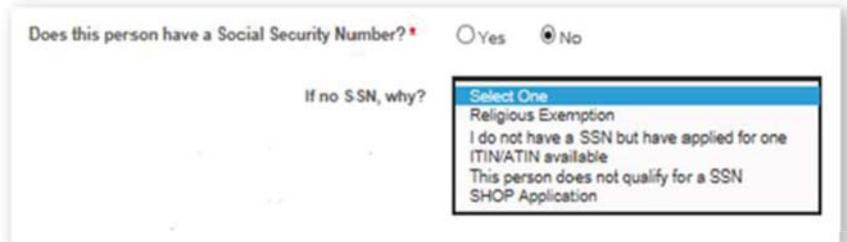
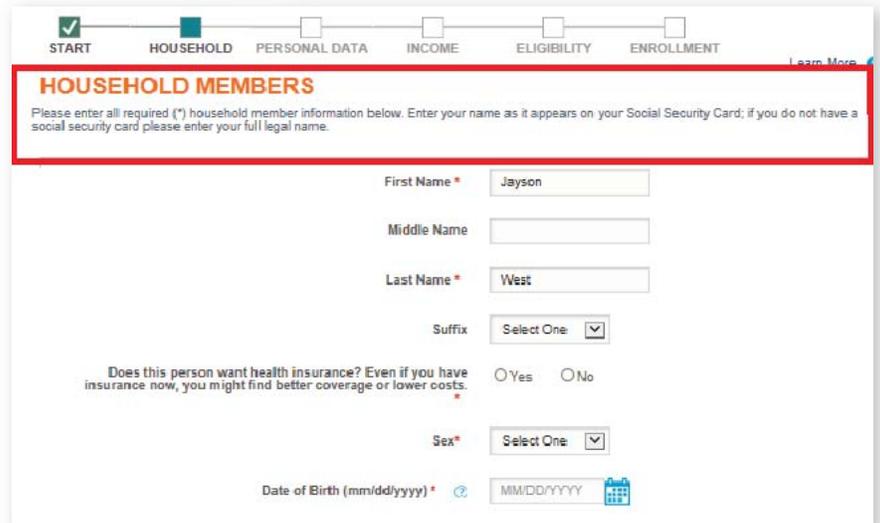
## Household Members Page

The Household Members page introductory text has been updated.

Other key changes on this page include:

### Social Security Number

- The 'Child under 1' option has been removed and an 'I do not have a SSN but have applied for one' option has been added to the **If no SSN, why?** dropdown list
- If **ITIN/ATIN available** is selected from the **If no SSN, why?** dropdown list, additional fields appear to enter the ATIN and/or ITIN



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## Citizenship

- If the **Yes** radio button is selected to answer: 'Is this person a U.S. Citizen or National', a second citizenship question no longer appears.

Is this person a U.S. Citizen or National? \*  Yes  No

Note to Employers and Employees applying for SHOP: Select "Yes" for U.S. Citizen/national and select "No" for Naturalized Citizen to proceed with your application. By doing so, you are not misrepresenting your current citizenship status.

## Eligible Immigration Status

- If the **No** radio button is selected to answer: 'Is this person a U.S. Citizen or National?', the **Eligible immigration status** checkbox appears as an optional field. **Note:** If the **Eligible immigration status** checkbox is not checked, clicking the **Continue** button at the bottom of the *Household Members* page allows the user to proceed to the next page of the application

Is this person a U.S. Citizen or National? \*  Yes  No

Note to Employers and Employees applying for SHOP: Select "Yes" for U.S. Citizen/national and select "No" for Naturalized Citizen to proceed with your application. By doing so, you are not misrepresenting your current citizenship status.

Check the box if this person has satisfactory immigration status. ⓘ  Eligible immigration status

- If the **Eligible immigration status** checkbox is checked, additional fields appear, such as the **Document Type** dropdown. Select an option from the **Document Type** dropdown list and enter information in the additional fields that display, based on the option selected from the dropdown list. **Note:** 'Other document with an Alien Number' and 'Other document with an I-94 Number' options have been added to the **Document Type** dropdown list.

Check the box if this person has satisfactory immigration status. ⓘ  Eligible immigration status

Document Type\* Select One

- Reentry Permit (I-327)
- Refugee Travel Document (I-571)
- Employment Authorization Card (I-766)
- Temporary I-551 Stamp (on passport or I-94, I-94A)
- Arrival/Departure Record (I-94, I-94A) issued by U.S. Citizenship and Immigration Services
- Certificate of Eligibility for Nonimmigrant (F-1) Student Status (I-20)
- Certificate of Eligibility for Exchange Visitor (J-1) Status (DS2019)
- Notice of Action (I-797)
- Document indicating American Indian born in Canada . LPR . I-551
- Document indicating member of a federally-recognized Indian tribe
- Certification from U.S. Department of Health and Human Services (HHS) Office of Refugee Resettlement (ORR)
- Office of Refugee Resettlement (ORR) eligibility letter
- Cuban/Haitian Entrant, Document indicating withholding of removal
- Resident of American Samoa
- Resident of Commonwealth of the Northern Mariana Islands
- Permanent Resident Card (Green Card, I-551)
- Arrival/Departure Record (I-94, I-94A) issued by U.S. Customs and Border Protection
- Machine Readable Immigrant Visa (with Temporary I-551 Language)
- Unexpired foreign passport
- Arrival/Departure Record in Unexpired Foreign Passport (I-94)
- Other Document with an Alien Number
- Other Document with an I94 Number

First name on the document \*

Middle name on the document

Last name on the document \*

Suffix on the document

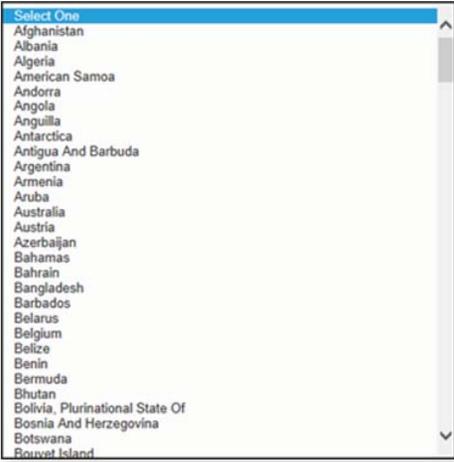
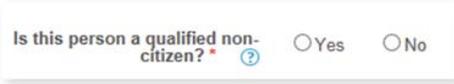
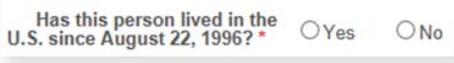
Is this person a qualified non-citizen? \* ⓘ

Has this person lived in the U.S. since August 22, 1996? \*

Is this person an honorably discharged veteran or active-duty member of the military? \*

Back Save & Exit Add Another Member Continue

Other changes on the *Household Member* page which may display based on answers to eligible immigration status questions are shown in the table on the next page.

Page Feature	Description
	<p><b>Country of Issuance</b> is a required field if <b>Temporary I-551 Stamp (on passport or I-94, I-94A)</b> or <b>Unexpired Foreign Passport</b> is selected from the <b>Document Type</b> dropdown list.</p> <p>The <b>Country of Issuance</b> dropdown list includes the 196 countries recognized by the Department of Health Services, in alphabetical order.</p> <p>If the <b>Country of Issuance</b> is a required field, <b>Passport Number</b> is also a required field.</p>
	<p>The <b>Card Number</b> field is now labeled <b>Receipt or Card Number</b>.</p> <p>Consumers who may have applied for but not yet received their Permanent Resident card can enter their receipt number instead of a card number.</p>
	<p>The <b>Document Expiration Date</b> field is optional for some document types such as the <i>Permanent Resident Card (Green Card)</i> but required for others, such as the <i>Employment Authorization Card (I-766)</i>.</p>
	<p><b>Is this person a qualified non-citizen?</b> is an optional field for non-applicants and a required field for applicants. Hover over the question mark icon for a list of examples of qualified non-citizens.</p>
	<p><b>Has this person lived in the U.S. since August 22, 1996?</b> displays if the <b>Eligible immigration status</b> checkbox is checked and the household member's date of birth is prior to 08/22/1996. This field has been updated with the addition of 'August 22' and is optional for non-applicants and required for applicants.</p>

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When the *Household Member* page is completed, clicking the **Continue** button navigates the user to the *Relationships* page. **Note:** Once the *Household Members* page is completed for all members on the application, CalHEERS performs the Lawful Presence Verification, if appropriate, using the Federal Hub.

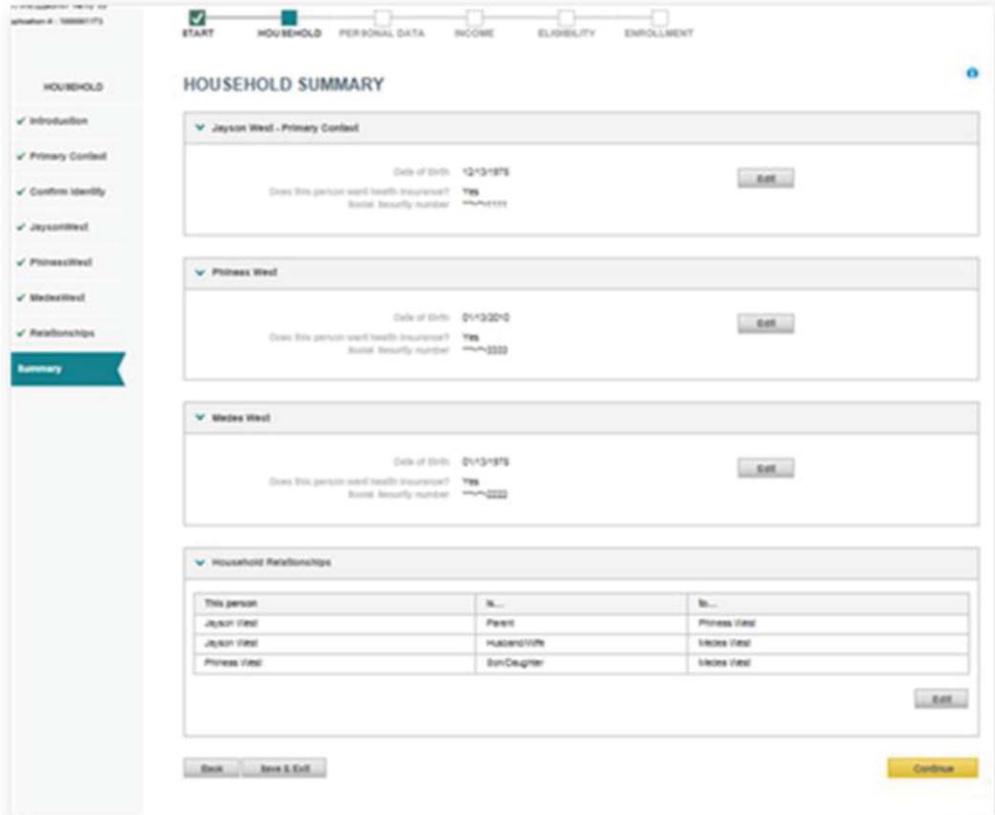
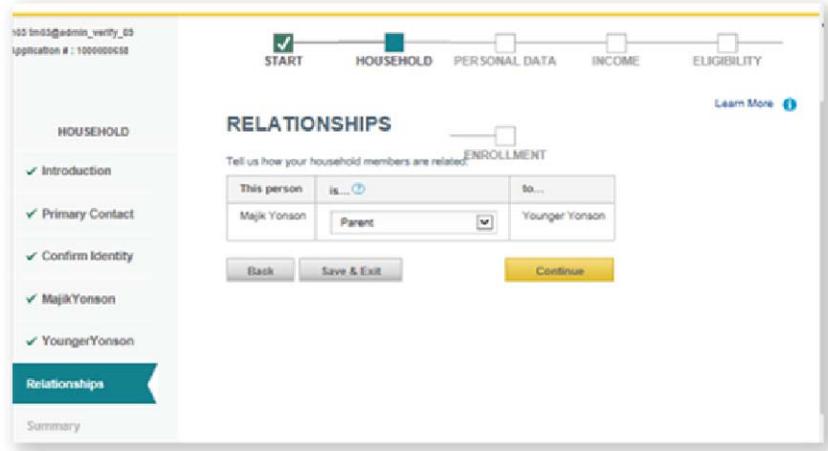
Once the *Relationships* page is complete, clicking the **Continue** button navigates the user to the *Household Summary* page.

## Household Summary Page

Carefully review the information displayed for each household member on the *Household Summary* page.

If a change to the household member information is needed, clicking the **Edit** button in the appropriate section opens the section and allows the user to update information in that section.

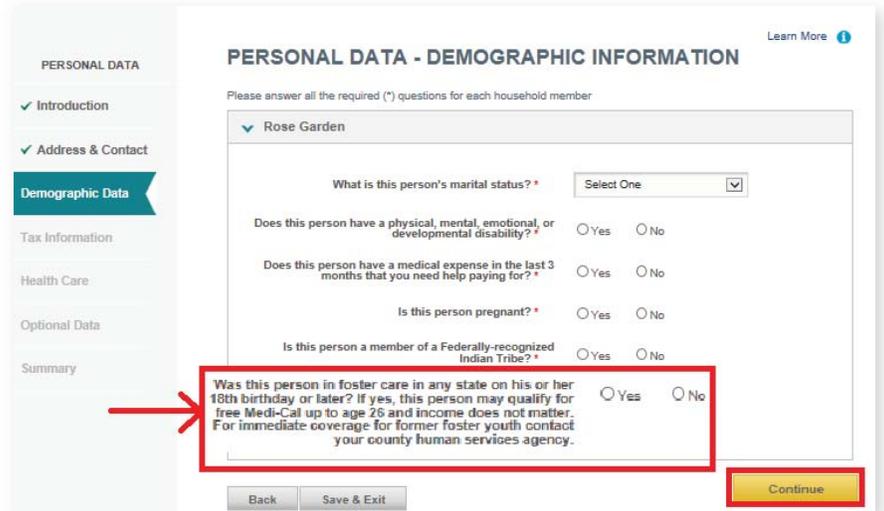
When the review is complete, clicking the **Continue** button navigates the user to the Personal Data application pages.



### Personal Data – Demographic Information Page

The *Personal Data – Demographic Information* page collects demographic data about household members.

For applications requesting financial assistance, the **Former Foster Care** message now displays for household members between the ages of 18 and 26 with information regarding immediate coverage for former foster youth through the county human services agency



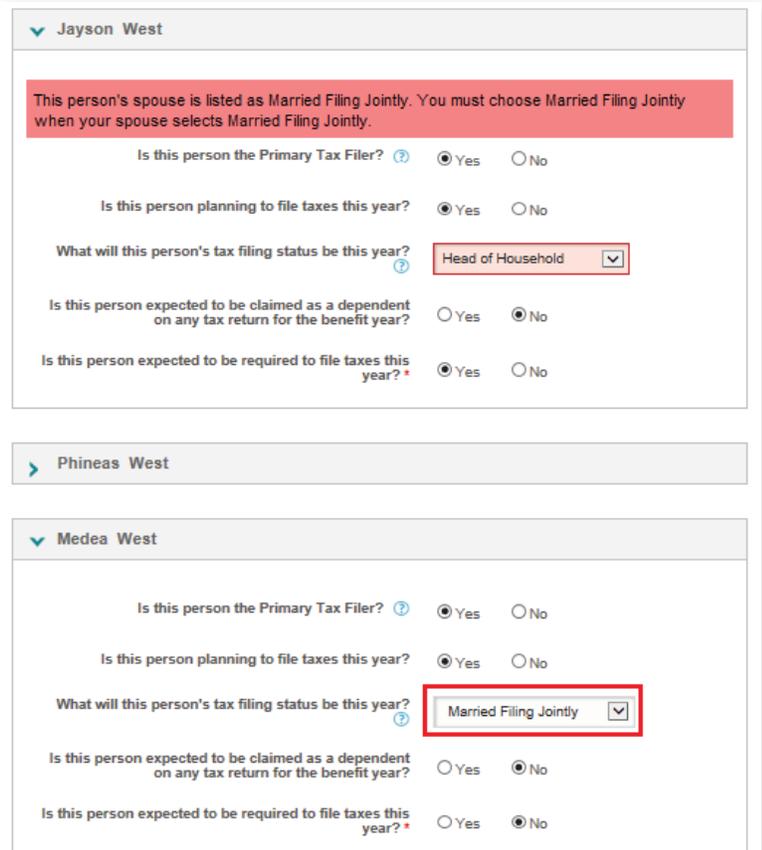
Once the *Personal Data – Demographic Information* page is complete, click the **Continue** button to navigate users:

- Who are not requesting financial assistance to the *Health Insurance Information* page.
- Who are requesting financial assistance to the *Tax Information* page to provide tax filing information before proceeding to the *Health Insurance Information* page.

### Personal Data - Tax Information Page

Updates on the *Personal Data - Tax Information* page include:

- Member’s previous year tax filing status question has been removed
- Warning messages appear when contradictory tax filing statuses are selected (For example, a warning message appears when one spouse selects ‘Married Filing Jointly’ and the other selects ‘Head of Household’.)
- Warning messages appear when contradictory tax dependent and custodial parent statuses are entered (For example, if an applicant for health



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coverage indicates they are claimed by a Non-Custodial Parent not listed on this application and the applicant does not have any parent/caretaker relationships established on this application, the user will not be able to continue from the page

- ‘Is this person expected to be required to file taxes this year’ is a required question for all household members on the application

## Personal Data – Health Insurance Information

Introductory text on the *Personal Data – Health Insurance Information* page has been updated.

Other changes to note on this page include:

- ‘Are you currently enrolled in any of these Plans/Coverage?’ displays as a required question for all applicants (**Note:** Hover over the question mark icon  for descriptions of items in the **Are you Currently Enrolled in any of these Plans/Coverage?** list.)
- The **APTC Warning** popup appears if ‘Are you Currently Enrolled in any of these Plans/Coverage?’ is answered ‘Yes’

It is important to note that Consumers with certain types of Minimum Essential Coverage (MEC) may be eligible to receive APTC/CSR if they have been offered but turned down enrollment in these MECs, or if their enrollment will be terminated before their coverage in a subsidized Covered California plan starts.

## Medicare

- ‘Does this person receive Medicare benefits?’ is a required question for all applicants and optional for non-applicants
- ‘Medicare’ has been added and the ‘Indian Health Service’, ‘Tribal

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Health Program' and 'Urban Indian Health Program' options have been removed from the **Does this person have or has this person been offered affordable, minimum standard health insurance for 20XX?** dropdown list

### Changes to Coverage

- **Are you expecting any changes to your current health care coverage?** displays if the user selects either the **Yes** radio button to answer 'Are you currently enrolled in any of these Plans/Coverage?' or **None of the Above** from the **Does this person have or has this person been offered affordable, minimum standard health insurance for 20XX?** dropdown list
- The **What is the termination date, if applicable, of your current or offered coverage?** date field now displays if the user selects the **Yes** radio button to answer **Are you expecting any changes to your current health care coverage?**

This field allows the user to enter a termination date for current or offered MEC.

### Employer Sponsored Insurance

If **Employer Sponsored Insurance outside Exchange** is selected from the **Does this person have or has this person been offered affordable, minimum standard value health insurance for 20XX?** dropdown list, the following additional fields appear:

- **How much would an individual employee pay in premiums under the lowest cost plan the employer offers?**
- **How often are premiums taken out of an employee's paycheck?**

Once the *Household Insurance Information* page is complete, clicking the **Continue** button at the bottom of the page navigates the user to the *Optional Information* page.

From the *Optional Information* page, clicking the **Continue** button navigates the user to the *Personal Data Summary* page.

This screenshot shows the 'Changes to Coverage' section. It includes three questions: 'Does this person have or has this person been offered affordable, minimum standard health insurance for 2014?' with a dropdown menu showing 'Retiree Health Plan'; 'Are you expecting any changes to your current health care coverage?' with 'Yes' selected; and 'What is the termination date, if applicable, of your current or offered coverage?' with a date picker icon.

This screenshot shows the 'Employer Sponsored Insurance' section. It includes a dropdown menu for 'Does this person have or has this person been offered affordable, minimum standard health insurance for 2016?' with 'Employer Sponsored Insurance outside Exchange' selected. Below this, there are several questions: 'Name', 'How much would an individual employee pay in premiums under the lowest cost plan the employer offers?', 'How often are premiums taken out of an employee's paycheck?' with 'Select One' selected, 'Does the health plan meet the minimum standard value?', 'Are you expecting any changes to your current health care coverage?', and 'What is the termination date, if applicable, of your current or offered coverage?'.

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## Personal Data Summary Page

Once the information on the *Personal Data Summary* page has been reviewed, clicking the **Continue** button on the *Personal Data Summary* page navigates the user to the next page in the application, based on the application type:

- For unsubsidized applications, the user navigates to the *Review Application* page
- For subsidized applications, the user navigates to the *Income* pages and must enter the required income information before continuing to the *Review Application* page.

Consumer Home | APPLY FOR HEALTH INSURANCE

EXPLORE (What's Right For You) | PREVIEW (Health Plans) | APPLY (To Get Covered) | GET HELP (Find Answers)

START [checked] | HOUSEHOLD [checked] | PERSONAL DATA [active] | INCOME [unchecked] | ELIGIBILITY [unchecked] | ENROLLMENT [unchecked]

PERSONAL DATA SUMMARY

PERSONAL DATA

- Introduction
- Address & Contact
- Demographic Data
- Tax Information
- Health Care
- Optional Data
- Summary

Tax Information - Majik Yanson

Health Care - Majik Yanson

Demographic Data - Majik Yanson

Optional Information - Majik Yanson

Tax Information - Younger Yanson

Health Care - Younger Yanson

Demographic Data - Younger Yanson

Optional Information - Younger Yanson

Back Save & Exit Continue

## Income Pages

Income pages collect data used to determine eligibility for help paying for coverage.

Key changes on the Income pages are highlighted below.

HOUSEHOLD INCOME

Introduction

Employment Income

Self-Employment In...

Other Income

Income Deductions

Income Summary

Learn More

EMPLOYMENT INCOME

Total current monthly household income: \$ 3000.00

On this page click the "Add Income" button to enter all of gross taxable employment income expected for the entire benefit year for everyone in your household.

For each employer, enter a record for the income at each pay rate during the year. Enter the First Date Paid as the date you started earning income at that pay rate. Do not enter a Date income Stopped for current employment.

If your pay rate changed during the benefit year add another entry for that employer where the First Date Paid is the date of your first paycheck at the new rate and the Date income Stopped is the date of your last paycheck at that pay rate.

If no one in the household has any employment income, Click the "Continue" button.

Person	Source of Employment Income	Amount	Frequency	First Date Paid	Last Date Paid	Edit	Delete
Jan Uary	Pretty Pets Grooming Salon	\$ 3000.00	Monthly	07/25/2011		Edit	Delete

Add Income

Back Save and Exit Continue

## Self-Employment Income

A negative number can be entered on the *Add Self-Employment Income* page to reflect situations where costs exceed income.

For example, if self-employment expenses exceed self-employment income by \$500, -\$500 can be entered in the **How much net income (profits after expenses) will this person get from this source this month(\$)** field on the *Add Self-Employment Income* page.

Type of work: Artist

How much net income (profits after expenses) will this person get from this source this month (\$): -500

First Date Paid - Estimate the date you first received income this year from this source: 01/01/2014

Last Date Paid - If you will continue to receive income from this source, please leave this blank. If this income source is ending, enter the date you will no longer receive income from this source. (Click the ? for help with this question) MM/DD/YYYY

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## Other Income

Additional options now display in the **What type of income?** dropdown list on the *Add Other Income* page:

- Interest Income
- Ordinary Qualified Dividends
- Rental or Royalty Income
- Taxable Refund Credits
- Offsets of State/Local Income Taxes

## Social Security Benefits Source

When **Social Security Benefits** is selected from the **What type of income?** dropdown list, the **Source** dropdown now appears.

The user must select one of three options to indicate the type of Social Security Benefits received:

- Social Security Retirement
- Social Security Disability
- Social Security Survivors

## Add Deduction Page

There are additional types of deductions that now display in the **Type of Deduction** dropdown list on the *Add Deduction* page, such as:

- Educator expenses
- Health Savings Account
- IRA deduction

**Add Other Income**

Household Member:

What type of income?

Source:

How much (\$):

How often:

First Date Paid - Estimate the date you first received income this year from this source

Last Date Paid - If you will continue to receive income from this source, please leave this blank. If this income source is ending, enter the date you will no longer receive income from this source.

**What type of income? dropdown options:**

- Select One
- Social Security Benefits
- Unemployment
- Retirement/Pension
- Capital gains
- Rental or Royalty income
- Farming or Fishing income
- Alimony Received
- Cancelled Debts
- Court Awards
- Jury Duty Pay
- Interest Income, 1099-INT
- Ordinary/Qualified Dividends, 1099-DIV
- Taxable Refund, Credits, or Offsets of State/Local Income Taxes
- Other Gains (or Losses), Form 4797
- Railroad Retirement Benefits (Taxable and non-Taxable), RRB-1099
- Foreign Earned Income (Taxable and non-Taxable), Form 2555
- Miscellaneous

**Add Other Income**

Household Member:

What type of income?

Source:

How much (\$):

How often:

First Date Paid - Estimate the date you first received income this year from this source

Last Date Paid - If you will continue to receive income from this source, please leave this blank. If this income source is ending, enter the date you will no longer receive income from this source.

**Source dropdown options:**

- Select One
- Social Security Retirement
- Social Security Disability
- Social Security Survivors

**Add Deduction**

Household Member:

Type of Deduction:

Paid to:

How much (\$):

How often:

First Date Paid - Estimate the date you first made a payment for this type of income deduction.

Last Date Paid - If you will continue to make payments for this type of income deduction, please leave this blank. If your payments are ending or have ended, enter the date you will no longer make a payment for this deduction.

**Type of Deduction dropdown options:**

- Select One
- Alimony Paid
- Student Loan Interest
- Other
- Business expenses of reservists, performing artists, etc
- Deductible part of self-employment tax
- Domestic production activities
- Educator expenses
- Health Savings Account
- Hobby income expenses, or expenses from an activity you did not e
- IRA deduction
- Moving expenses
- Penalty on early withdrawal of savings
- Rental of personal property expenses
- Self-employed health insurance deduction
- Self-employed SEP, Simple, and qualified deduction
- Tuition and fees paid by individual (not paid by financial aid)

**Income Summary Page**

Review the information on the *Income Summary* page.

**Expected Yearly Household Income**

The **Expected Yearly Household Income** section now displays on the *Income Summary* page and shows the total expected yearly household income, based on the information entered in the Income pages.

If changes are needed, clicking the **Edit** button for the appropriate income type returns the user to the income page so that updates can be made.

Clicking the **Continue** button on the *Income Summary* page navigates the user to the *Review Application* page.

Clicking the **If you expect your total household income to be different from this in 20XX, then Click Here** link in the **Expected Yearly Household Income** section navigates the user to the *Expected Income* page.

**Expected Income Page**

The *Expected Income* page displays expected yearly income for each household member.

The amount in the **We Expect** column is based on information entered in the Income pages.

The amount in the **You Expect** column is the same as the amount displayed in the **We Expect** column.

A **Details** link and an **Edit** link displays for each household member listed.

Household Member	We Expect	You Expect	Edit	Reset
Majik Yonson	\$36000.00 <a href="#">Details</a>	\$35000.00	<a href="#">Edit</a>	
Younger Yonson	\$0.00 <a href="#">Details</a>	\$0.00	<a href="#">Edit</a>	
<b>Total</b>	<b>\$ 36000.00</b>	<b>\$ 35000.00</b>		

## JOB AID: SINGLE STREAMLINED APPLICATION

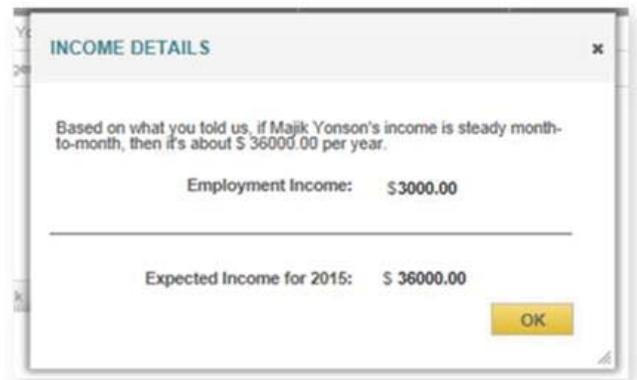
- View details about the amount of income displayed in the **We Expect** column by clicking the **Details** link. Keep in mind the amount in the **We Expect** column can be changed before the application is submitted by returning to the Income pages and updating information.
- If the amount in the **You Expect** column is incorrect, the user has the option to edit the amount displayed by clicking the **Edit** link. Note that if the amount in the **You Expect** column is edited, a **Reset** link displays in the **Reset** column, allowing the user to return the amount to the original amount displayed ( i.e., the same amount displayed in the **We Expect** column).

### Income Details

Click the **Details** link in the **We Expect** column for a household member to view income details for that household member.

The **Income Details** popup appears with information about how the expected amount of income was calculated.

Click the **OK** button on the **Income Details** popup to return to the *Expected Income* page.

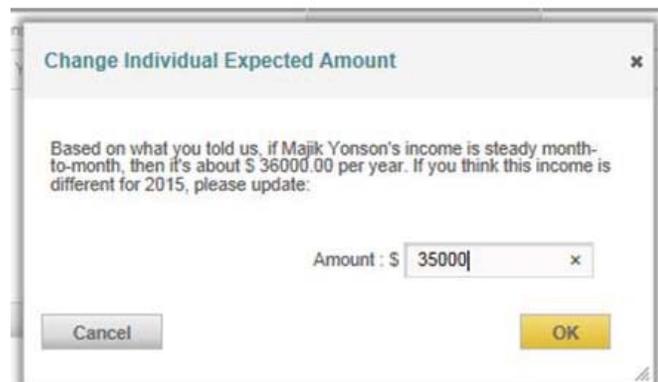


### Change Individual Expected Amount

Click the **Edit** link in the **Edit** column of the *Expected Income* page for a household member to edit the amount in the **You Expect** column for that household member.

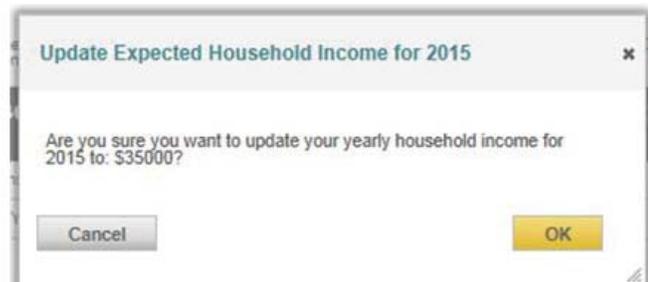
The **Change Individual Expected Amount** popup appears.

Enter the expected amount in the **Amount** field and click the **OK** button to update the amount in the **You Expect** column for the household member.



The **Update Expected Household Income** confirmation popup appears to confirm the change. Click the **Cancel** button to cancel the change and return to the *Expected Income* page.

Click the **OK** button to confirm the change. The edited amount displays in the **You Expect** column on the *Expected Income* page.



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### Reset

If the amount in the **You Expect** column is edited, a **Reset** link displays in the **Reset** column. Clicking the **Reset** link allows the user to reset the amount displayed in the **You Expect** column to the original amount (before any edits), regardless of the number of times the amount may have been edited.

To reset the amount in the **You Expect** column, click the **Reset** link in the **Reset** column for the household member.

The **Update Expected Household Income** confirmation popup appears.

- Clicking the **OK** button resets the amount.
- Clicking the **Cancel** button closes the popup without resetting the amount.

Once the *Expected Household Income* page is complete, clicking the **Save & Continue** button returns the user to the *Income Summary* page. When all Income pages are complete, clicking the **Continue** button on the *Income Summary* page navigates the user to the *Review Application* page.

### Review Application Page

The *Review Application* page summarizes information from the application pages.

The *Review Application* page features new introductory text to inform users to be sure they selected 'Yes' to financial assistance if they want to see if they qualify for free or low-cost Medi-Cal or tax credits with Covered California, and that they have the option to go back to change their selection if they did not.

Clicking the **Edit** button in the **Application Type** section returns the user to the *Help Paying for Coverage* page to change their application type selection. The user is then navigated through the application pages to enter information appropriate for the application type

Household Member	We Expect	You Expect	Edit	Reset
Majik Yonson	\$36000.00 <a href="#">Details</a>	\$35000.00	<a href="#">Edit</a>	<a href="#">Reset</a>
Younger Yonson	\$0.00 <a href="#">Details</a>	\$0.00	<a href="#">Edit</a>	
Total	\$ 36000.00	\$ 35000.00		

Update Expected Household Income for 2015

Are you sure you would like to reset your Projected Annual Income for this household member?

[Cancel](#) [OK](#)

REVIEW APPLICATION

Read all your information. Check to be sure it is correct. Click "Edit" to make changes.

If you would like to see if you qualify for free or low-cost Medi-Cal or tax credits with Covered California, make sure you selected "Yes" to Financial Assistance. You can click "Edit" to go back and change your answer to this question in the Start Application section.

Application Type

Want help paying for health insurance?	Yes
SHOP Employer Coverage	No
How did you hear about Covered California?	Document Id
Apply for	Self

## JOB AID: SINGLE STREAMLINED APPLICATION

Once the application is complete, it is a good practice to review all the information summarized within the *Review Application* page for accuracy.

If needed, clicking the **Edit** button in a section opens the section and allows the user to make changes.

Once the application is complete, clicking the **Continue** button allows the user to proceed to the next page.

### Voter Registration

The *Voter Registration* page displays once the **Continue** button on the *Review Application* page is clicked.

When the *Voter Registration* page is complete, clicking the **Continue** button navigates the user to the *Application Signature* page.

### Application Signature

Complete the *Application Signature* page to submit the application.

- Complete the **Special Enrollment** section, if appropriate.

**REVIEW APPLICATION**

Read all your information. Check to be sure it is correct. Click "Edit" to make changes.

If you would like to see if you qualify for free or low-cost Medi-Cal or tax credits with Covered California, make sure you selected "Yes" to Financial Assistance. You can click "Edit" to go back and change your answer to this question in the Start Application section.

> Application Type

> Household

> Monthly Household Income

> Household Member - Jan Uary

> Primary Contact

> Jan Uary - Demographic Data

> Tax Information - Jan Uary

**VOTER REGISTRATION**

Covered California is a voter registration agency and is providing you the opportunity to register to vote. To register to vote, you must be a U.S. citizen and at least 18 years old by the next election. If you are not registered to vote where you live now, would you like to apply to register to vote today?

Yes, open the California Online Voter Registration website in a new tab.

Yes, please mail me a voter registration card

No

NOTE: IF YOU DO NOT MAKE A CHOICE, YOU WILL BE CONSIDERED TO HAVE DECIDED NOT TO REGISTER TO VOTE AT THIS TIME AND A VOTER REGISTRATION CARD WILL BE MAILED TO YOU.

**Important Notices**

1. Applying to register or declining to register to vote will not affect the amount of assistance that you will be provided by this agency.
2. If you would like help in filling out the voter registration form, we will help you. The decision whether to seek or accept help is yours. You may fill out the voter registration form in private.
3. If you believe that someone has interfered with your right to register or to decline to register to vote, your right to privacy in deciding whether to register or in applying to register to vote, or your right to choose your own political party preference or other political preference, you may file a complaint with the Secretary of State by calling toll-free (800) 345-VOTE (8693) or you may write to: Secretary of State, 1600 - 11th Street, Sacramento, CA, 95834. For more information on elections and voting, please visit the Secretary of State's website at [www.sos.ca.gov](http://www.sos.ca.gov).

Back Save & Exit Continue

**APPLICATION SIGNATURE**

Please read the following information. Then check the boxes and sign (Electronic Signature). Click "Submit" to send your completed application.

**Special Enrollment**

You must have a qualifying life event to qualify for Covered California Special Enrollment. Regardless of the life event selected, we will see if you are eligible for Medi-Cal or Access for Infants and Mothers.

Do any of the following qualifying life events or situations apply to you? \* Select One

Click here for more information about qualifying life events.

This application qualifies for Special Enrollment as a result of a qualifying life event. \* Select One

Coverage Date Category \* Select One

Enter today's date or the date of your qualifying life event if you have one \* |

Special Enrollment Expiry Date \*

## JOB AID: SINGLE STREAMLINED APPLICATION

- Complete the **Maintaining your Verification** and **Review and Sign** sections, appropriate for the user type.
- Click the **Submit** button at the bottom of the page to submit the application.

Once the application is submitted and the eligibility results reviewed, the user can continue to the plan selection and enrollment.

### Maintaining Your Verification

I understand that the Covered California will use my tax return at renewal time each year for the next 5 years to see if I qualify for help paying for health coverage. I understand that I can change my answer later.

Maintain My Consent for:

I know that I must report any changes to information on this application. For example, I must report a new address, a new member of the household, or a change in income.

### Review and Sign

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

This means that I have understood all the questions on this application and provided true and correct answers to such questions to the best of my knowledge. Where I do not have personal knowledge of an answer, I have made every reasonable attempt to verify (or confirm) the information with someone who has personal knowledge of the answer.

I acknowledge that if I am not truthful, I know that there may be a civil and/or criminal penalty for perjury (under California Penal Code Section 126, perjury is punishable by imprisonment for up to four years).

I know that all information disclosed on this application will be used to determine eligibility of every person applying for health insurance on this application. The information will be kept private as required by federal and California law.

I know that I must tell Covered California or the County Social Services Office about anything changes from what I have provided on this application.

By entering my full name below, I agree that this digital signature shall have the same force and effect as if I signed this application by my own hand.

I certify that I have the permission of the Applicant to complete this Application on their behalf, have explained to them their Rights and Responsibilities in entering the Exchange, and obtained their signature or been previously granted the right to sign on their behalf.

Electronic Signature \*

Electronic PIN \*  [Forgot PIN](#)

## Report a Change

To report a change, click the **Report a Change** button on the *Individual Home* page.

The *Report a Change Summary* page appears.



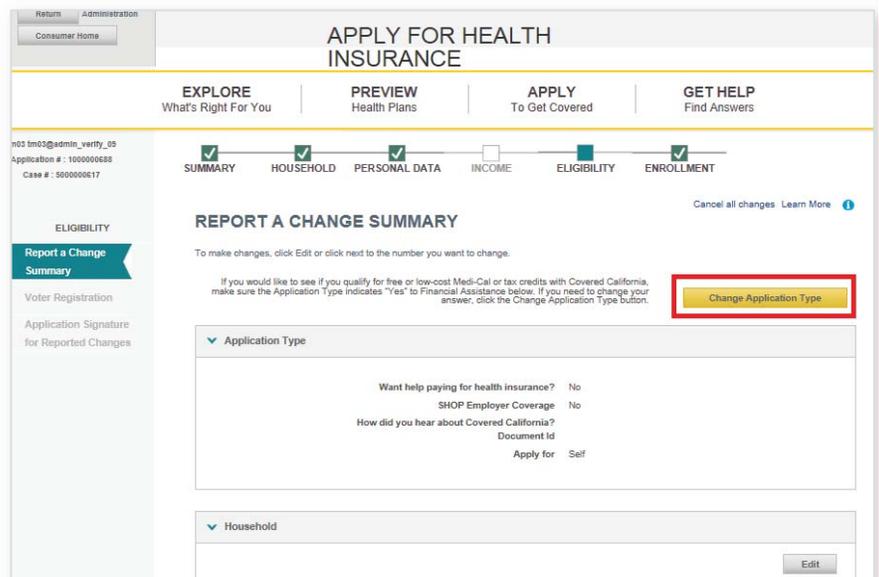
## Change Application Type

If the initial application is unsubsidized (without financial assistance), the **Change Application Type** button now displays in the **Application Type** section on the *Report a Change Summary* page to allow the user to change the application type to subsidized (with financial assistance).

**Note:** Only an application without financial assistance can be changed to an application with financial assistance.

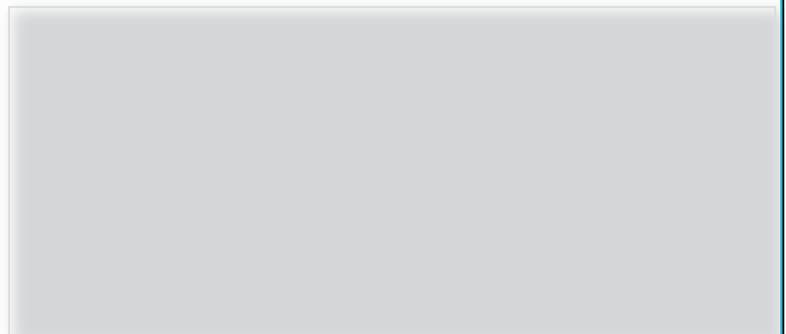
A submitted subsidized application cannot be changed to an unsubsidized application and the **Change Application Type** button does not display on the *Report a Change Summary* page for a subsidized case.

Click the **Change Application Type** button to change the application from an unsubsidized application to a subsidized application.



The **Get Help with Costs** popup appears.

- Click the **No** button to return to the *Report a Change Summary* page without changing the application type.
- Click the **Yes** button to return to the Apply for Benefits - *Get Help with Costs* page to change the application type then continue through the application pages to provide required information.



# JOB AID: SINGLE STREAMLINED APPLICATION

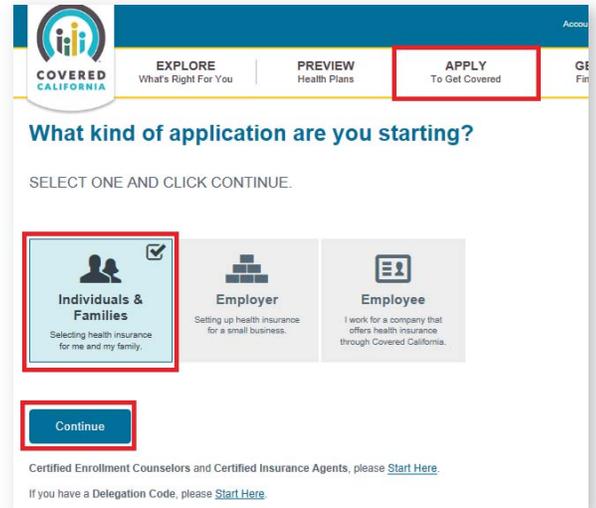
## Create an Account to Apply

Consumers completing an online Covered California application independently must first create an account.

To create an Individual account, click the **Apply** tab on the Global Header to navigate to the redesigned *Set up an Account* page to begin account creation.

Hover or click the **Individual & Families** role on the *Set up an Account* page. The **Continue** button appears.

Click the **Continue** button to begin the account creation process.



## For Agents, CECs and PBEs Only:

To create an Agent or CEC account, click the **Apply** tab on the Global Header. The redesigned *Set up an Account* page appears. To begin the account creation process, click the **Certified Enrollment Counselors and Certified Insurance Agents, please Start Here** link.

If you have a delegation code to link to the Consumer's application, click the **If you have a Delegation Code, please Start Here** link to begin.

If an application has been submitted on the Consumer's behalf (for example, by a Covered California Service Center Representative, Certified Enrollment Counselor, or Certified Insurance Agent), the Consumer was given an Access Code to link that application to the account being created.

You will be able to enter this access code during the account creation process.

