



Marketplace application checklist

Before creating account/starting application

- Department of Consumer and Business Services/Oregon Health Authority consent form
- Privacy Notice Statement
- Is a translator needed? Are there any physical or other limitations?
- Assess current insurance situation
 - Is this their first time applying? Do they need to submit a renewal?
 - Does anyone in the household have current health coverage? If so, what kind?
 - Is anyone offered coverage through their employer or a family member's employer?
- Determine tax household Who is applying for coverage?
- Are they ready for the appointment?
 - Income Immigration/personal information Employer coverage information
- Explain the application and enrollment process
- Help consumer calculate estimated annual income and current month's income

Create account and submit application

- Create account, log in, or recover account information, if needed (do not create new account)
- Verify identity (if creating account for the first time)
- Complete application
- Download and read Eligibility Notice
 - Premium tax credits? Cost-sharing reductions Special enrollment period

Select a plan and enroll

- Explain tax credits; help consumer select amount to use
- Enter prescriptions, doctors, and/or facilities they want to be covered
- Select a plan
- Offer to print a copy of the Summary of Benefits and Coverage document
- Enroll in the selected plan
- Help choose/enroll in dental plan (optional)

Post-enrollment

- Upload verification required by Marketplace
- Complete Enrollment Records form and provide to consumer
- Explain when first premium is due
- Write down any next steps that were not completed
- Remind them to report any changes that occur throughout the year