

#### **Overview**

The Intelligent Document Processing (IDP) provides Covered California a way of electronically verifying documents that have been uploaded by consumers and Enrollers using Google Document Artificial Intelligence (AI). This process allows real-time review of uploaded documents and its ability to match the information needed in CalHEERS.

IDP only reviews verifications for citizenship, incarceration, income, identity, and lawful presence documents.

#### Adding a Document or Uploading a File

1. Consumers and Enrollers upload documents on the *Documents and Correspondence* page and upload files on the *Eligibility Documents* page and from the *Household Summary* on the Home page when clicking **View actions and alerts**.





The *Upload Eligibility Documents* page lists requested documents for all household members and verification category on one page.

← Eligibility Results				
Upload Eligibility Documents You can use this page to upload and submit all requested documents for each person. Click here for more information				
Step 1: Upload document(s) for each request below. You can also log in and upload photos of your documents from your mobile device.	Step 2: When you're done uploading documents, tap "Submit for Review" at the bottom of the page.			
Alexander S. 47 yrs				
Proof of Medicare Coverage	Due: 8/30/2025			
Upload <b>ONE</b> of the following documents				
Social Security Administration Letter     Medicare Letter     Medicare Card				
	Upload Document			
Proof of Minimum Essential Coverage	Due: 8/30/2025			
Upload <b>ONE</b> of the following documents				
<ul> <li>Notice of Action of discontinuance from Medicaid</li> <li>Confirmation of disenrollment from employer sponsored health insurance plan</li> <li>Confirmation of disenrollment from health insurance plan</li> </ul> Show more options V				
	Upload Document			



2. To upload a document for that section, select **Upload document**.

The *Upload Document* page provides details for acceptable documents including size, type, not password protected, and fewer than 15 pages.

Upload Document				
Proof of Minimum Essential Coverage				
Document needs to meet the following:				
<ul> <li>Maximum document size: 10 MB</li> <li>Accepted document formats: Excel, Word, PowerPoint, JPEG, JPG, TIFF, PDF, RTF, PNG, GIF or JFIF</li> <li>Not a password protected document</li> </ul>				
Other details for uploading a document:				
<ul> <li>The document is not dark or hard to read</li> <li>All details are clear and in focus</li> <li>No part of the document is cut off</li> <li>The document is 15 pages or fewer</li> </ul>				
Â				
Drop a file here or <u>browse your computer</u>				
Cancel Next				

- 3. The consumer or enroller can upload a file from their computer or drag and drop a file on the *Upload Document* page.
- 4. Click **Next** to continue.



#### Income

The *Income Attestation* form is accessed from the *Proof of Income* section of the *Upload Eligibility Documents* page.

- 1. To proceed with Intelligent Document Processing (IDP), select the **Complete attestation** button.
  - Submit this form link opens a PDF of the Income Attestation

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Upload Eligibility Documents	
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Step 1.	
Upload documentig) for each request when you're ou'ne uploading oucumeno, belew. You can adio fae' in adu olad at by "Submit for Review" at the bottom of	
photos of your documents from your the page.	
mobile device.	
Proof of Income Due: 6/25/2025	
Upload ONE or the following accuments	
Commonly Used	
• ray too	
Copy of target year's feed at the constant and annual annual annual annual target and then	
• copy of an international states and the states an	
• Managements Don't have a Proof of Income document?	
Copy discoversion     You can easily confirm you is income using the Opline Income Attentation form. You can also	
Proof of ramed in TOU can easily commit your income using the Online income Attestation form. Fou can also Complete Attestati	on
submit this form as proof instead.	
Copy of lan year's I	
Copy of taxyser's I	
Other documents to support Proof of Earned Employee Wages Income	
Proof of Self-Employment Income	
Receipts displaying prote profile     And expenses	
Other documents to support Self Employment income	
Show more options V	
Don't have a Proof of Income document?	
You can easily confirm your income using the Online lincome Attestation form. You can also Complete Attestation Submit this form as more for finand. Complete Attestation	
Linix Conner	
Submit for Review	

The *Confirm Your Income* page displays. This page allows consumers to attest to household income when they do not have access to income verifications. Only one HHM needs to attest to the household income.

- **Name** dropdown Displays the HHM with pending income verification
- **Annual household income** is editable and defaults to the income reported on the application
- **Tooltip** Includes the visit CoveredCa.com link



- **Cancel** button Cancels the attestation
- **Submit** button Completes the income attestation and navigates the user to the Upload Eligibility Documents page

**Note**: Changing the annual income does not update the income reported on the application. The income attestation is subject to IDP review for compatibility.

<ul> <li>Back to Upload Eligibility Documents</li> </ul>	
Confirm Your Income You can Submit this for proof of income if you don't have the right documents. You only have to submit one form for your entire household. Confirm the following information and form. Review Your Information Case number 5193235715 Name Hiro Hamada	Annual household income is total gross amount for all household members who have income. This includes anyone you claim as a dependent when you file taxes. For
Annual household income Or \$ 31,000	more information on how to estimate your income, <u>visit CoveredCa.com</u>
<ul> <li>Please read and agree to the following:</li> <li>I acknowledge that the information provided on this form will only be used for purposes of eligibility determination for financial assistance. Covered California will keep this informati private, as required by federal and California law.</li> <li>I understand that I must report income changes to Covered California within 30 days of the change because it may affect the amount of premium assistance (or tax credits) or the leve cost-sharing reduction for which I may qualify.</li> <li>I understand that this income attestation is only valid for the benefit year for which coverage requested and must be renewed each benefit year.</li> <li>I understand that if I receive too much premium assistance (or tax credits) during the benefit will have to pay some or all of the excess premium assistance back to the Internal Revenue Service (IRS) when I file my federal income tax return for the benefit year.</li> <li>I declare under the penalty of perjury, under the laws of the state of California, that what I above is true and correct.</li> </ul>	f on e el of ge is ufit year, re stated
Electronic signature Hiro Hamada Date 04/14/2025 Cancel	smit



The *Upload Document* page provides details for acceptable documents including size, type, not password protected, and fewer than 15 pages.

Upload Document				
Proof of Income				
Document needs to meet the following:				
<ul> <li>Maximum document size: 10 MB</li> <li>Accepted document formats: Excel, Word, PowerPoint, JPEG, JPG, TIFF, PDF, RTF, PNG, GIF or JFIF</li> <li>Not a password protected document</li> </ul>				
Other details for uploading a document: <ul> <li>The document is not dark or hard to read</li> <li>All details are clear and in focus</li> <li>No part of the document is cut off</li> <li>The document is 15 pages or fewer</li> </ul>				
$\langle \gamma \rangle$				
Drop a file here or <u>browse your computer</u>				
Cancel				

**Note**: The back arrow icon displays when uploading Proof of Income documents and more than one HHM requires income verification.

- 2. Drag and drop the verification document or browse to select the document on the computer.
  - Error messaging displays when a password protected or corrupted document is selected for upload.





Once the document has been uploaded, the *Upload Document* page displays when IDP is unable to automatically classify the document.

3. Click the radio button of the type of document that is being uploaded.

Upload Document
Choose the type of document you are uploading
✓ Pay stub
<ul> <li>Signed letter from employer that displays the gross income, payment frequency, and date of paycheck (Employer Statement)</li> </ul>
Other documents to support Proof of Earned Employer Wages Income
O Bank statement
O Investment account statement
O Payment records (notes and mortgages)
O Other documents to support Proof of Interest Income
C Lease or sales agreement
○ Records such as gross rents and expense receipts
O Other documents to support Proof of Rental Income
O Receipts displaying gross profit and expenses
O Business records such as profit and loss statements
○ Other documents to support Self Employment Income
O District Attorney/Family Support (DAFS ) records
O Other documents to support spousal income and child support
<ul> <li>Most Recent Social Security Administration Cost-of-Living Adjustment Letter</li> </ul>



#### The Review Document page displays.

Review Document	×			
The document you uploaded is more than 15 pages.     Pick a document under 15 pages to upload for faster results, or continue Pay stub	e.			
Document Preview:				
	Ô			
PAY STUB				
Employer Name: Lone Pine Mall				
Name: Biff Tannen				
SSN: 360-50-0012				
Date of Birth: 01/01/1981				
Pay Date: Mar/24/2024				
Pay Period: Mar/4/2024 - Mar/17/2024	•			
Pay Stub BIFF 17 pages.pdf				
Replace Document Keep This Document				

- Replace Document Discards the document
- Keep this Document Displays the Upload Document Successful popup

The *Upload Document* popup for citizenship displays when IDP detects that a second citizenship document is required and allows the user to upload a second document from the required list.

- Show more options link Expands to display the complete list of Acceptable List [A/B] Documents
- **Cancel** button Closes the popup
- **Next** button Continues with the upload process



Upload Document				
TC19_HH2_CIT_1.pdf Uploaded on: 03/13/2025 3:58:05 AM				
Your document was uploaded successfully! You need to upload an additional document from List B to verify your citizenship.				
Acceptable List B Documents:				
<ul> <li>A clinic, doctor, hospital, or school record, including preschool or day care records</li> <li>Divorce Decree</li> <li>Employer ID card</li> </ul>				
Show more options 🗸				
Cancel Next				

The *Review Document Information* popup displays when the uploaded document does not meet verification requirements.

- **Replace Document** displays the Upload Document popup to upload a new document
- Keep this Document displays the:
  - *Existing Upload Document* successful popup when no other actions are required
  - Upload Document secondary citizenship popup when a citizenship document was uploaded and another document is required.

The *Review Document Information* popup also displays when IDP detects discrepant information.

• The Data Mismatch Found section displays discrepant data between the application and the uploaded document.



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Document Nan Pay Stub BIFF.pd	ne df			
This document does not meet our requirements. The Pay Date on this paystub is either too old or for the future. You can upload a new document or give us this one for further review.				
Pay Date 2024-03-24				
Data Mismatch Found				
Data Mismatch	Touria			
We found inforr application.	nation in your document	t that doesn't match your		
Uata Mismatch We found inforr application.	BASED ON YOUR APPLICATION	t that doesn't match your BASED ON YOUR DOCUMENTS		
We found inforr application. Employee Name	BASED ON YOUR APPLICATION Hiro Hamada	t that doesn't match your BASED ON YOUR DOCUMENTS Biff Tannen		
We found inforr application. Employee Name Do you need t updating your	nation in your document BASED ON YOUR APPLICATION Hiro Hamada o update your applicatio application after you sub	BASED ON YOUR DOCUMENTS Biff Tannen		

The *Missing Proof of Income Documents* popup displays when:

• A user clicks the Submit for Review button on the Upload Eligibility Documents page

AND

- There is at least one HHM that is missing proof of income documents.
- Back button closes the popup
- Continue to Submit button Submits the uploaded documents for review and navigates the user to the new Your information does not match page when the IDP detects information discrepancies.



	^
	<u> </u>
We still	need proof of income for these household members:
• El	eanor Roberts, (44)
You can income we will r	go Back to upload income documents or complete online attestation. Or you can Continue to Submit your documents, but not be able to verify your income at this time.

4. Click **Submit for Review** button. This is <u>required</u> to initiate the manual review of documents submitted.

	Submit for Review
3	Thank you! Your documents have been submitted and are being verified.
ý	We will reach out to you if a document cannot be verified and we have more questions. You can see the status and next steps on your <u>Account Home</u> Household Summary.

#### Citizenship

The *Upload Document* page displays for citizenship when IDP is unable to detect the document type.

- Links with **Option 1** and **Option 2** documents display.
- 5. Select a document type from the list of options and select **Next**.
  - Note: the Next button only enables when document type(s) have been selected.
  - **Cancel** button cancels the upload and closes the popup

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Upload Document	Upload Document
Proof of Citizenship         Choose your Citizenship document from the following list of options.         Option 1 Documents         Image: U.S. Passport or U.S. Passport Card, current or expired (issued without limitation)	Proof of Citizenship Choose your Citizenship document from the following list of options. Option 1 Documents Option 2 Documents
<ul> <li>Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Document on Tribal letterhead, issued under the signature of the appropriate Tribal official</li> <li>Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Certificate of Degree of Indian Blood</li> <li>Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Certificate of Degree of Indian Blood</li> <li>Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Tribal census document</li> <li>Certificate of Naturalization (Form N-550, Form N-570)</li> <li>Certificate of U.S. Citizenship (Form N-560, Form N-561)</li> <li>Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Tribal enrollment or membership identification card</li> </ul>	List A: Consular Report or Certificate of Child Born Abroad (Form FS-545, Form FS-240, Form DS-1350) U.S. Public Birth Certificate U.S. citizen identification card Federal or State census record A final adoption decree U.S. military records Evidence of U.S. Civil Service employment before June 1, 1976 U.S. Medical records with child's name and indicating a U.S. place of birth. U.S. Insurance records indicating a U.S. place of birth. School records showing the child's name and U.S. place of birth
List B: Driver's License School ID card U.S. military card/draft record/Military dependent's ID card U.S. coast Guard Merchant Mariner card A clinic, doctor, bospital or school record, including preschool or	Official religious records recorded in the U.S.
<ul> <li>A clinic, doctor, nospital, or school record, including preschool or day care records</li> <li>Employer ID card</li> <li>High school or college diploma</li> <li>Foreign birth certificate</li> <li>Social Security card</li> <li>Marriage Certificate</li> <li>Divorce Decree</li> <li>Property deed or title</li> </ul>	

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