



Verifications Enhancements for Enrollers Task Guide

Overview

This guide explains the Mini-Assessment in the CalHEERS application.

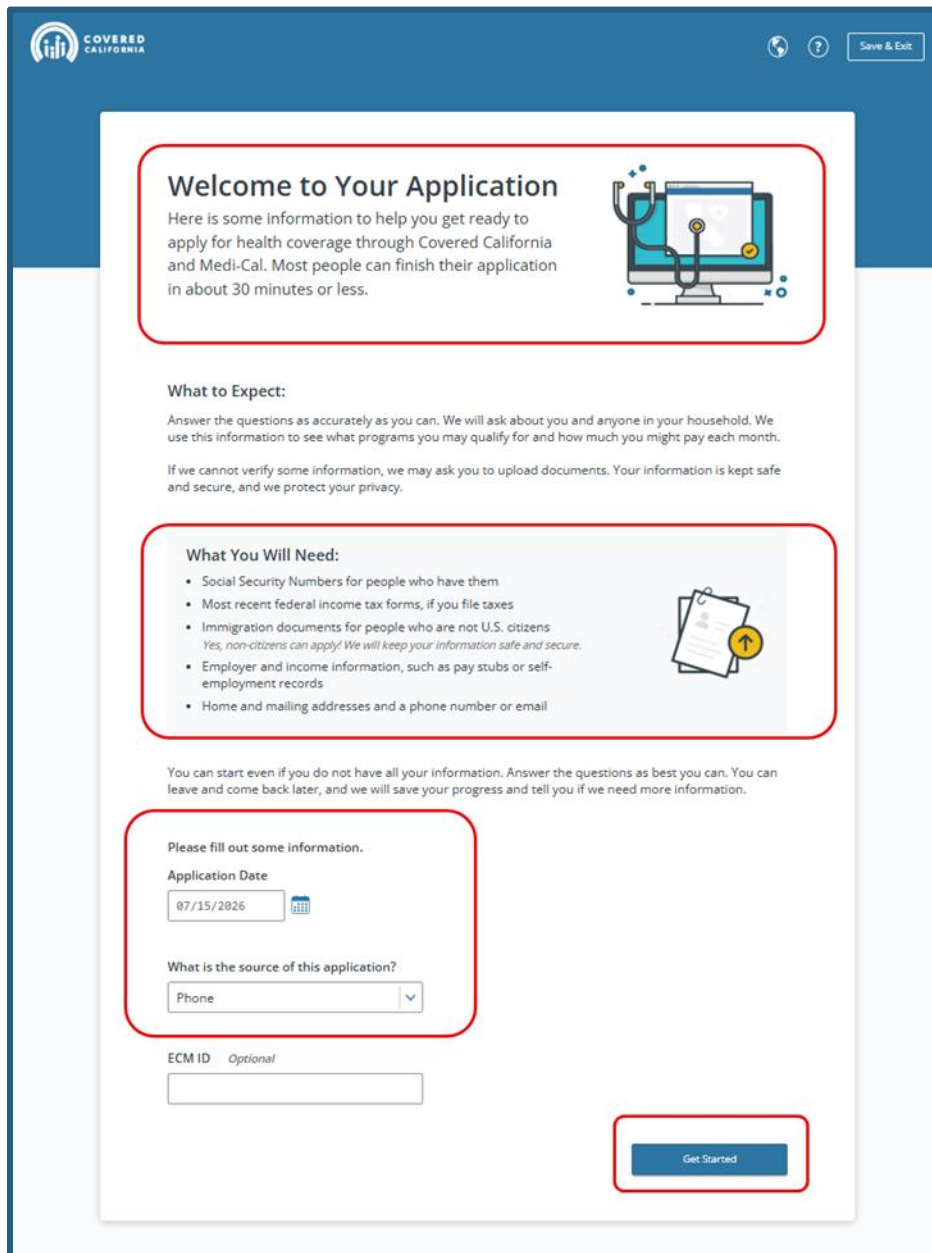
Background

A new Mini-Assessment is presented before the *Sign and Submit* page in the application. Enrollers should expect more up-front verification support during the application process. Enrollers should be prepared to help consumers correct information and provide documents earlier in the process.

The Mini-Assessment is intended to identify verification issues earlier in the application flow for Covered California only households. Users may be directed to edit application information or upload documents before submitting the application. The goal is to reduce unresolved verifications prior to the final submission.

The *Welcome to Your Application* section informs about what to expect, information to have ready and options for assistance in application submission. This will assist enrollers to submit a successful application with minimal eligibility inconsistencies.

Enrollers can be prepared to help consumers correct information and provide documents earlier in the process.



Welcome to Your Application

Here is some information to help you get ready to apply for health coverage through Covered California and Medi-Cal. Most people can finish their application in about 30 minutes or less.

What to Expect:

Answer the questions as accurately as you can. We will ask about you and anyone in your household. We use this information to see what programs you may qualify for and how much you might pay each month.

If we cannot verify some information, we may ask you to upload documents. Your information is kept safe and secure, and we protect your privacy.

What You Will Need:

- Social Security Numbers for people who have them
- Most recent federal income tax forms, if you file taxes
- Immigration documents for people who are not U.S. citizens
Yes, non-citizens can apply! We will keep your information safe and secure.
- Employer and income information, such as pay stubs or self-employment records
- Home and mailing addresses and a phone number or email

You can start even if you do not have all your information. Answer the questions as best you can. You can leave and come back later, and we will save your progress and tell you if we need more information.

Please fill out some information.

Application Date
 

What is the source of this application?
 

ECM ID *Optional*

Get Started

Prior to Voter Registration, CalHEERS will do a verification check in the background and notify user to allow resolving pending or unverified items before submitting the application.

Identified inconsistencies will guide user to list of actions and outstanding verification to resolve prior to signing and submitting application.

Let's check your application to make sure you are ready to submit!



We want to verify your information with our records to make sure that your application is ready to submit.

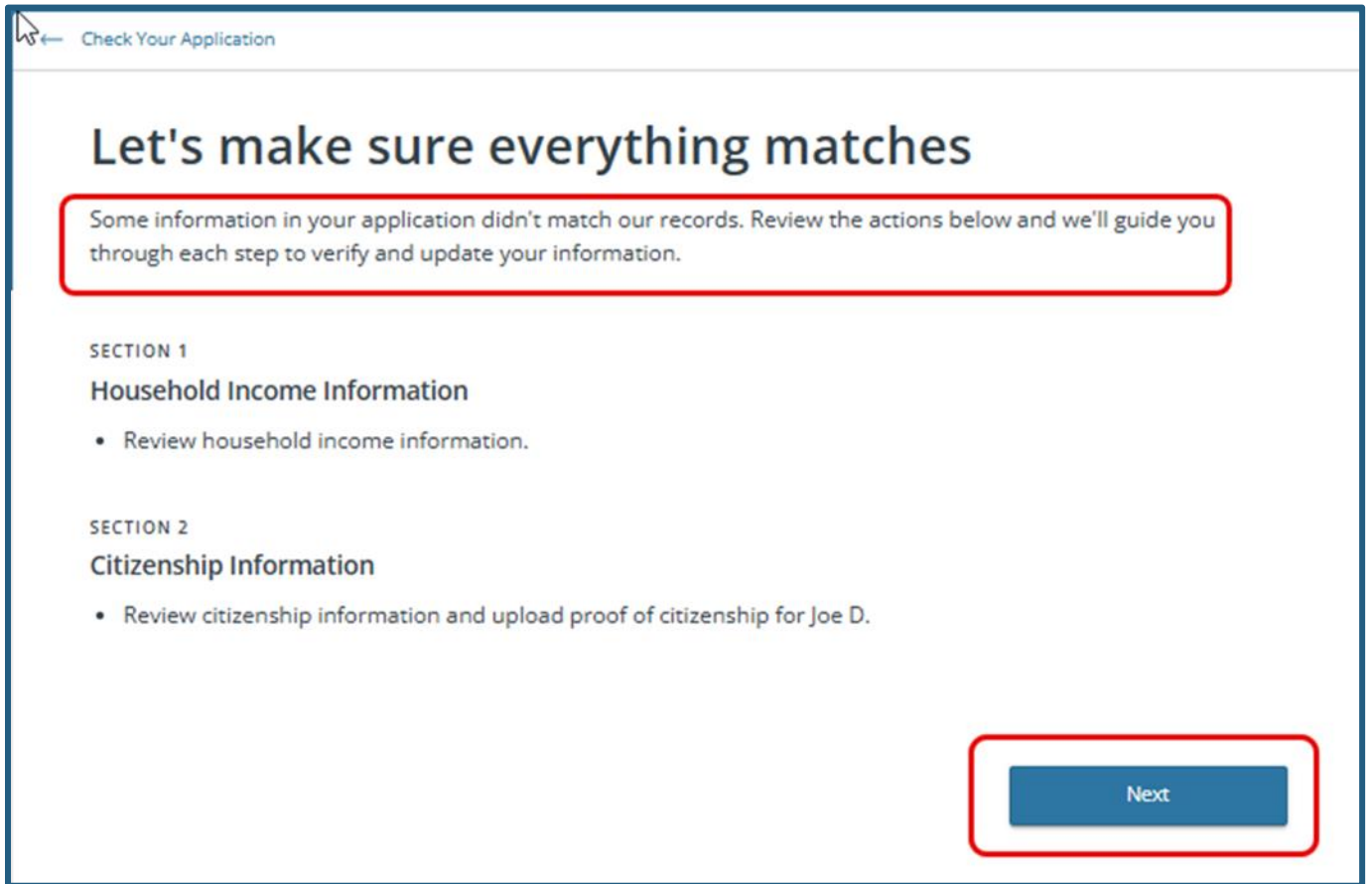
You can go back and review your information. When you're ready, continue and we'll check your application.

[Back](#) [Check my application](#)

A guided flow addresses one verification issue at a time, with prefilled info, a clear next step and edit path back into the application. This covers key verification types:

- Social Security Number (SSN)
- Income
- Citizenship and immigration status

A progress tracker shows the current step and what comes next allowing the user to anticipate remaining work. This should result in less confusion, clearer expectation so the user can focus on one issue at a time.



← Check Your Application

Let's make sure everything matches

Some information in your application didn't match our records. Review the actions below and we'll guide you through each step to verify and update your information.

SECTION 1
Household Income Information

- Review household income information.

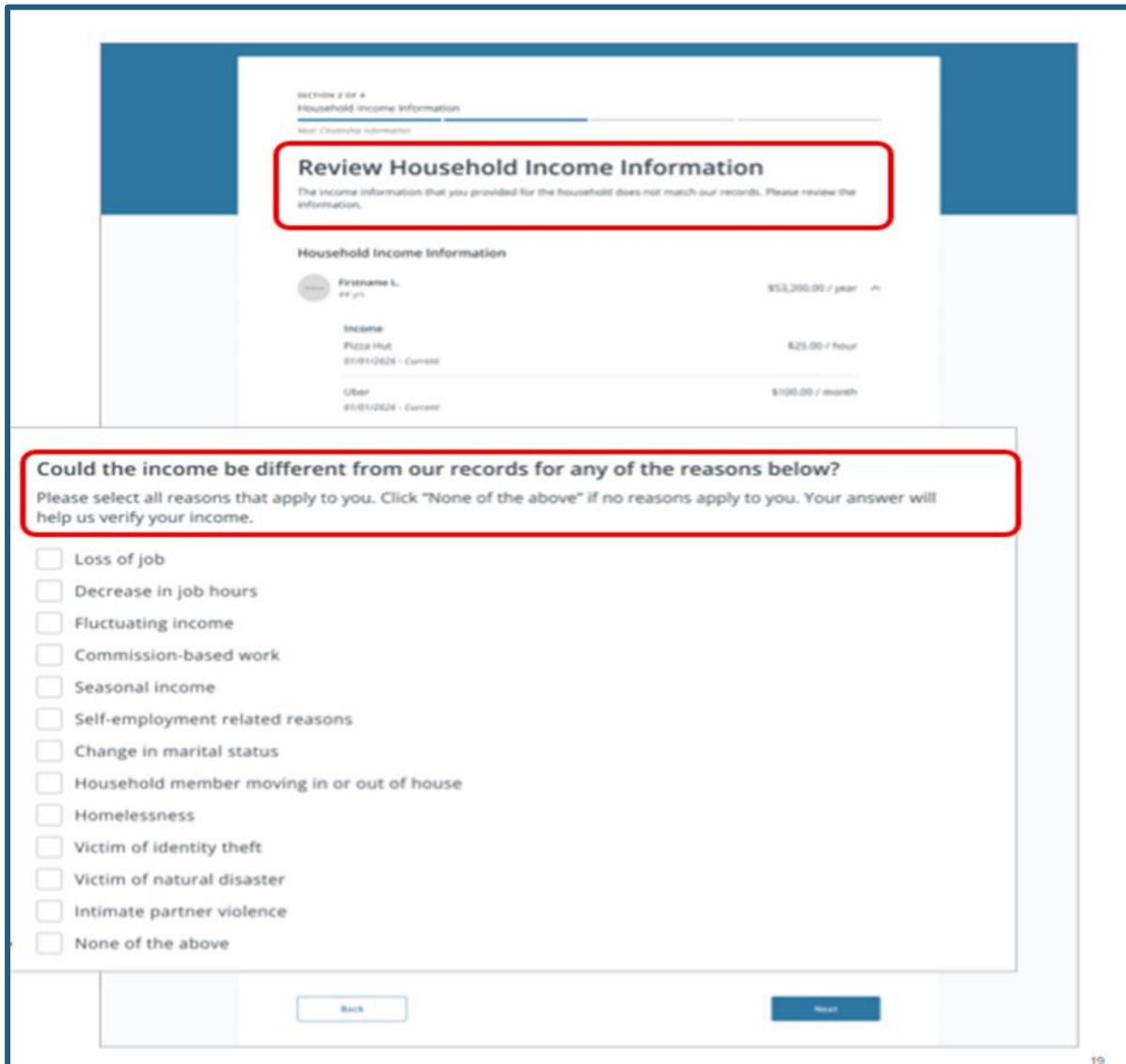
SECTION 2
Citizenship Information

- Review citizenship information and upload proof of citizenship for Joe D.

Next

Clicking the **Next** button takes the user to the first section to review.

Income inconsistency displays at the household level. Reasonable Explanation (REX) opens to provide reason for income discrepancy.



Section 2 of 4
Household Income Information
New: Claiming information

Review Household Income Information
The income information that you provided for the household does not match our records. Please review the information.

Household Income Information

Member	Income	Amount
Firstname L. 44 yrs		\$53,200.00 / year
	Income	
	Pizza Hut 01/01/2024 - Current	\$25.00 / hour
	Uber 01/01/2024 - Current	\$100.00 / month

Could the income be different from our records for any of the reasons below?
Please select all reasons that apply to you. Click "None of the above" if no reasons apply to you. Your answer will help us verify your income.

- ☐ Loss of job
- ☐ Decrease in job hours
- ☐ Fluctuating income
- ☐ Commission-based work
- ☐ Seasonal income
- ☐ Self-employment related reasons
- ☐ Change in marital status
- ☐ Household member moving in or out of house
- ☐ Homelessness
- ☐ Victim of identity theft
- ☐ Victim of natural disaster
- ☐ Intimate partner violence
- ☐ None of the above

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If selecting none of the above the *Attestation of Income* form is available to upload or option to upload other income documents. The *Attestation of Income* form auto populates the household income, Primary tax filer name and date of application.

When completed, the *Attestation of Income* uploads the form and clears the income inconsistency.

Section 1 of 2
Household Income Information

Next: Citizenship Information

Confirm Household Income Information

Please confirm the income information using one of the following options.



Income Attestation

Confirm the income with an online form. You do not need to upload any documents.

Attest to income



Upload Documents

Upload pay stubs, W-2s, or 1099s.

Upload Documents

You can complete this section now or after submitting your application. Be sure to finish all remaining actions to avoid losing coverage or benefits.

Back

Next

Covered California
Outreach and Sales Division
OutreachandSales@covered.ca.gov

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September 11, 2026



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Section 1 of 2
Household Income Information

Next: Citizenship Information

Attest to income

You can confirm your income with this form. **You only have to complete this once for your entire household.** Confirm the following information and sign this form.

Primary Tax Filer:

Gigi James

Calculated Yearly Income of Gigi James's Tax Filing Household:

\$31,100 /year

Please read and agree to the acknowledgements:

- 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 information private, as required by federal and California law.
- 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 level of cost-sharing reduction for which I may qualify.
- I understand that this income attestation is only valid for the benefit year for which coverage is requested and must be renewed each benefit year.
- I understand that if I receive too much premium assistance (or tax credits) during the benefit year, I 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.
- I declare under the penalty of perjury, under the laws of the state of California, that what I stated above is true and correct.

☒ I agree and certify that I have read the acknowledgements.

Date

07/22/2026



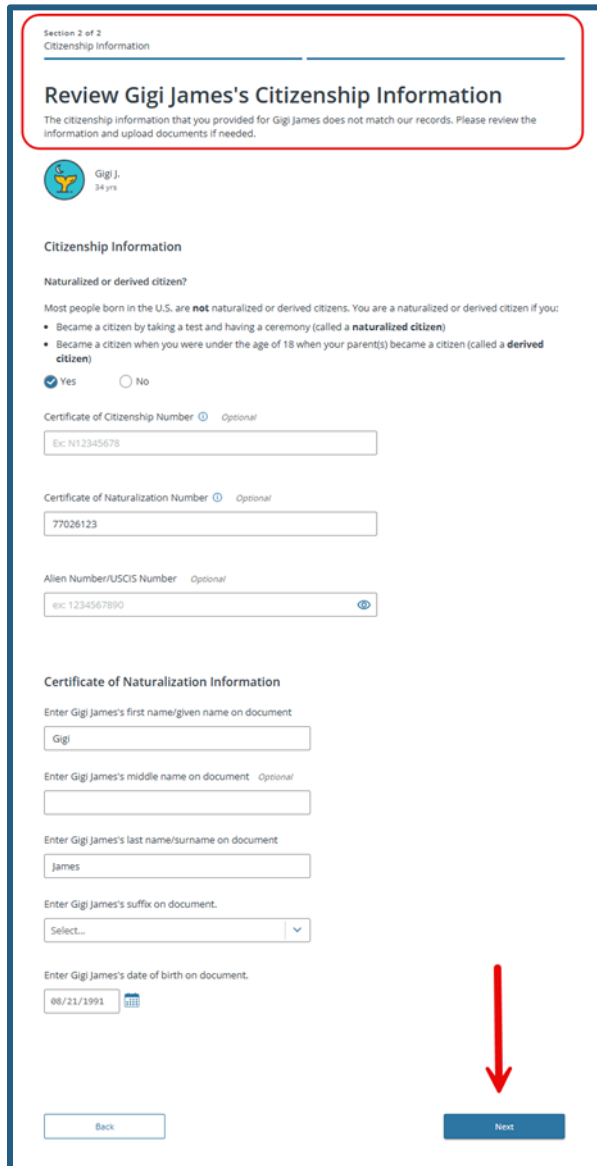
Cancel

Submit

The *Review [HHM]'s Citizenship Information* page displays with a message indicating the information provided does not match previous records. This could be for different reasons, and this page allows the user to edit details that were initially entered.

For the example, **Yes** is answered for Naturalized or Derived Citizen and a definition of both is provided. The **Next** button is available if information is edited or not.

Clicking **Next** will take the user to the next step of the Mini Assessment.



Section 2 of 2
Citizenship Information

Review Gigi James's Citizenship Information

The citizenship information that you provided for Gigi James does not match our records. Please review the information and upload documents if needed.

 Gigi J.
34 yrs

Citizenship Information

Naturalized or derived citizen?

Most people born in the U.S. are **not** naturalized or derived citizens. You are a naturalized or derived citizen if you:

- Became a citizen by taking a test and having a ceremony (called a **naturalized citizen**).
- Became a citizen when you were under the age of 18 when your parent(s) became a citizen (called a **derived citizen**).

☒ Yes ☐ No

Certificate of Citizenship Number Optional
Ex: N12345678

Certificate of Naturalization Number Optional
77026123

Alien Number/USCIS Number Optional
ex: 1234567890

Certificate of Naturalization Information

Enter Gigi James's first name/given name on document
Gigi

Enter Gigi James's middle name on document Optional

Enter Gigi James's last name/surname on document
James

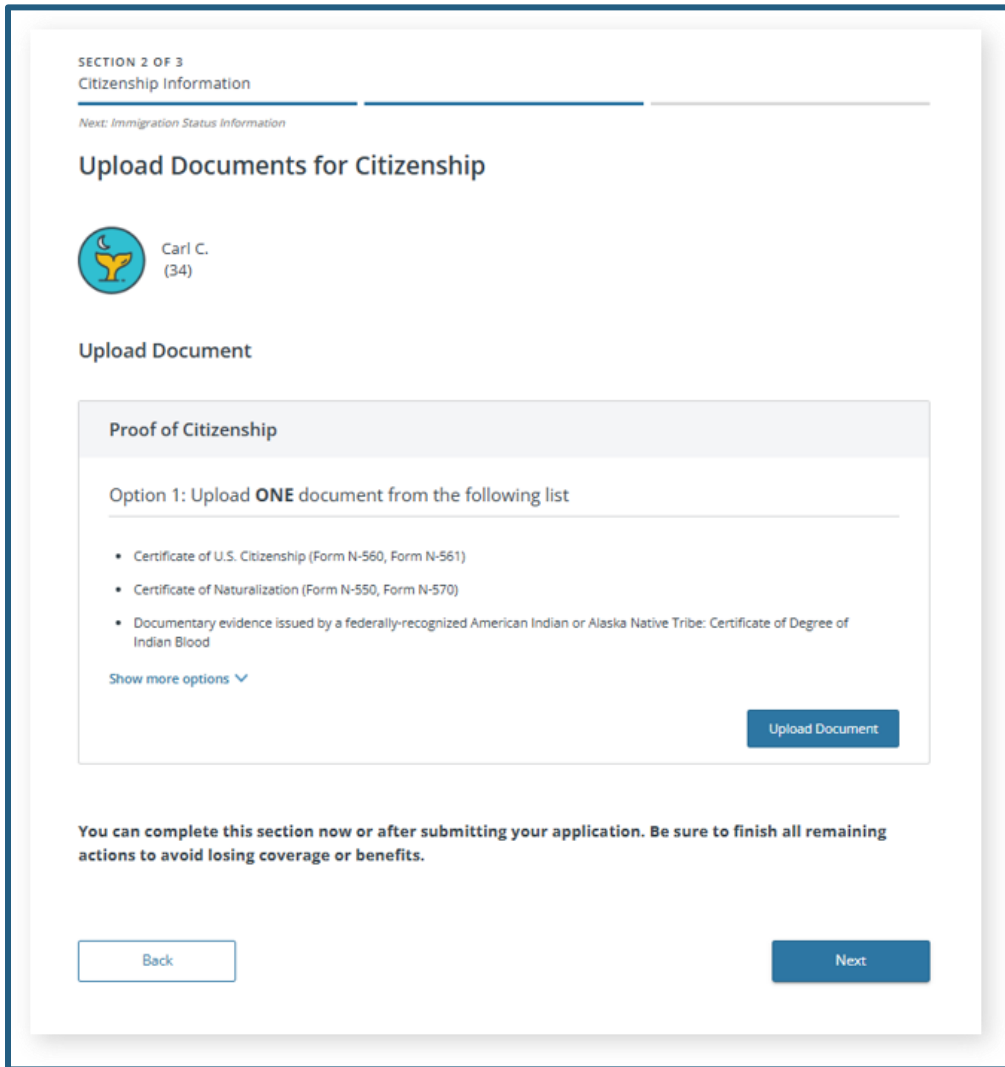
Enter Gigi James's suffix on document.
Select...

Enter Gigi James's date of birth on document.
08/21/1991

[Back](#) [Next](#)

The *Upload Documents for Citizenship* page and *Upload Documents for Immigration Status* pages display an Upload Document section which displays a list of acceptable documents for the verification category.

Clicking the **Upload Document** button displays the *Upload Document* popup.



SECTION 2 OF 3
Citizenship Information

Next: Immigration Status Information

Upload Documents for Citizenship

 Carl C.
(34)

Upload Document

Proof of Citizenship

Option 1: Upload **ONE** document from the following list

- Certificate of U.S. Citizenship (Form N-560, Form N-561)
- Certificate of Naturalization (Form N-550, Form N-570)
- Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Certificate of Degree of Indian Blood

Show more options ▾

Upload Document

You can complete this section now or after submitting your application. Be sure to finish all remaining actions to avoid losing coverage or benefits.

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SECTION 3 OF 3
Immigration Status Information

Upload Documents for Immigration Status



Blanca B.

(33)

Upload Document

Proof of Immigration Status

Upload **ONE** of the following documents

1

For foreign passport documents, upload one file that includes both the front page with your picture and the page with your U.S. entry stamp. Please combine these pages into a single document before uploading.

Commonly Used

- Current Temporary I-551 stamp on a foreign passport.
- Current Temporary I-551 stamp on form I-94/I-94A.
- Foreign Passport.
- A refugee admitted to the U.S. under Section 207 of the INA.
- Authorization for Parole of an Alien into the United States (Form I-512).
- Notice or court order from an Immigration Judge granting parole for at least one year.

Proof of Temporary or Non-Immigration Status

- Employment Authorization Document (Card) (I-766)
- U.S. Visa
- Arrival/Departure Record (I-94/I-94A)
- Certificate of Eligibility for Nonimmigrant Student Status (Form I-20)
- Permit to Re-Enter (Form I-327)
- Application for Suspension of Deportation (EOIR-40)
- Application for Cancellation of Removal for Certain Permanent Residents (EOIR-42A)
- Application for Cancellation of Removal and Adjustment of Status for Certain Nonpermanent Residents (EOIR-42B)
- Application to Replace Permanent Resident Card (Form I-90)
- Form I-589, Application for Asylum and for Withholding of Removal

Proof of Permanent Residency

- Permanent Resident Card or "Green Card" (I-551)
- INS Form I-181 Memorandum of Creation of Record of Lawful Permanent Residence

Show more options

Upload Document

You can complete this section now or after submitting your application. Be sure to finish all remaining actions to avoid losing coverage or benefits.

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Next

The *Review and edit information* page displays when there is one or more of the following unverified information:

- Unverified Information – Dynamically displays:
 - **Medicare Information with Review and edit the information** link
 - **Other Health Care Information with Review and edit the information** link
 - **American Indian / Alaska Native Status Information with Review and edit the information** link
 - *Incarceration Status Information* with **Upload a document** link
 - Clicking the **Upload a Document** link navigates the user to the *Upload Documents for [HHM]'s Incarceration Status* page
- **Back** button
- **Next** button – Exits the Application Verification process

Review and edit information

The information below does not match our records or needs to be verified with documents. You can review and edit this information in your application. If the information is correct, you can verify the information with documents after you submit the application.

Medicare Information

- The Medicare information that you provided for Carl C. does not match our records.
[Review and edit the information](#)
- The Medicare information that you provided for Bianca B. does not match our records.
[Review and edit the information](#)

Other Health Care Information

- The other health care information that you provided for Carl C. does not match our records.
[Review and edit the information](#)
- The other health care information that you provided for Bianca B. does not match our records.
[Review and edit the information](#)

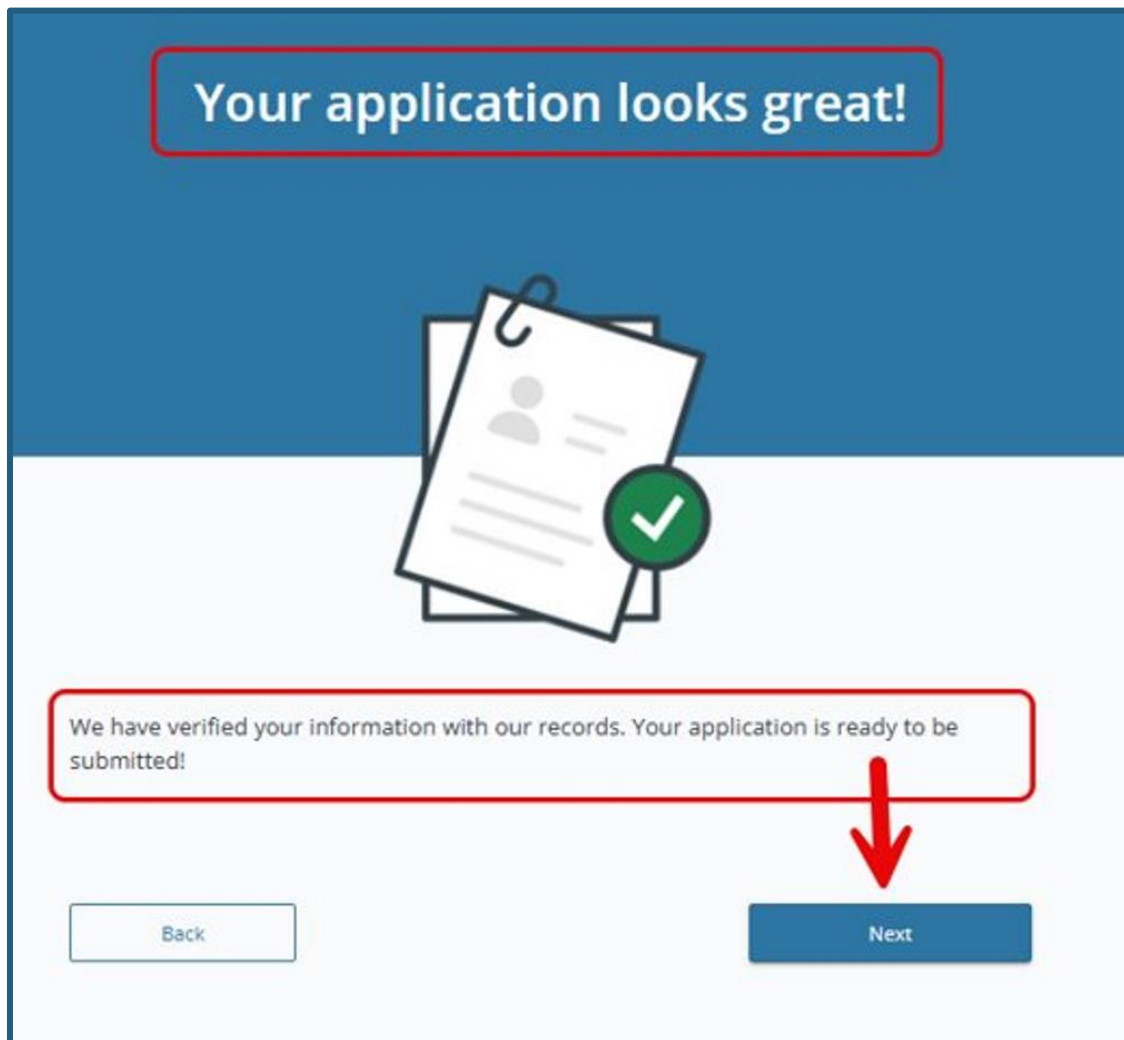
American Indian / Alaska Native Status Information

- The American Indian / Alaska Native information that you provided for Carl C. will need to be verified.
[Review and edit the information](#)

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A *Your application looks great* page displays after completing edits or upload of documents that clear the potential pending verification.

A success message will also display if during the precheck there were no potential pending verifications found. After signing and submitting the application, there should not be any conditional eligible attributes.



After clicking the **Next** button, the application will proceed to the *Voter Registration* page and *Sign and Submit*.