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JOB AID: UPLOADING VERIFICATION DOCUMENTS

July 14, 2014

This Job Aid shows how to upload verification documents, in order to help applicants understand the process. Consumers applying for health coverage and financial assistance may need to provide verification documents when their eligibility result is either Conditional or Pending. This happens when Covered California needs additional information to determine eligibility, or when the information provided in the previously submitted application does not match information provided by our electronic data sources, such as the Federal Data Services Hub (DSH) or the Employment Development Department (EDD).

Applicants can upload verification documents immediately after receiving a determination of Conditional Eligibility. To do so, the applicant clicks on the **Submit Documents** link on the *Eligibility Results* page. If the applicant does not have immediate access to the required documentation, they can come back later to their *Individual* home page and navigate to the *Manage Verifications* page from there.

The process outlined below is documented from the applicant's viewpoint, so those with an administrative role can better understand and support the procedure.

How to Upload Verification Documents (Consumer View)

Uploading verification documents in Covered California is a simple process:

- Starting at the *Individual* home page, click on the **Manage Verifications** link to move to the **Manage Verifications** page. This page is only available for cases that have uploaded or need to upload verifications. Information will only be available for household members who have a status of Conditionally Eligible or Pending Eligible.
- Access the *Submit Verifications* page by clicking on the **Submit Verifications** tab on the left side of the *Manage Verifications* page.

(Note: It is also possible to reach this page by clicking on the **Submit Documents** link on the *Eligibility Results* page.)

ACTIONS

- [Withdraw Application](#)
- [Report a Change](#)
- [Continue Change Report](#)
- [Withdraw Change Report](#)
- [Select Health / Dental Plan](#)
- [Terminate Participation](#)
- [Request Exemption](#)
- [Submit/Manage Appeal](#)
- [Manage Verifications](#)**

RESOURCES

- [Manage Delegates](#)
- [Download PDF Application](#)
- [Get Adobe PDF Reader](#)

MORE OPTIONS

- [Authorized Representative](#)
- [Register to vote](#)

MANAGE VERIFICATIONS

Select a row to see details below.

Verification ID	Category	Submit Date	Status	Status Date	Action
165	Individual Eligibility Determination		INITIATED	07/11/2014	Edit Withdraw

Documents Uploaded

Person	Category	Type	Name	Uploaded	Action
Juan Rodarte	Proof of Income	Pay stub	Rodarte pay stub.docx	07/11/14 12:38:33 PM	View

ELIGIBILITY RESULTS

Your eligibility is pending additional information. See details below.

Juan Rodarte

Medi-Cal Pending Eligibility - Please check your Mailbox for more information.

Your application is pending. To receive benefits, you must provide additional information.

Submit Documents

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3. Review the **Household Information** section to confirm it is the correct case

4. Review the **Required Documents** section. The **Required Documents** section will display for every household member who needs to provide additional verification documents. Only Household Members with a **Required Documents** section need to provide the Documents listed

5. The *Submit Verification* page displays the category of document that the applicant needs to upload to fulfill a verification request from Covered California, descriptions of documents that the applicant can upload within that category, links to any previously uploaded documents, and a link to upload a new document. The status of any previously uploaded document is also available.

6. Clicking on the **Upload** link displays the **Upload Document** page, displaying more details of previously uploaded documents and a link to upload a new document.

- Click the **View** link to view a previously uploaded document.
- Remove the uploaded document by clicking the **Remove** link.
- Click the **Upload Document** link to display the *Document Upload* popup.

7. In the *Document Upload* popup, choose the type of document to be uploaded from the **Document Type** dropdown list, browse for the document to be uploaded on your computer, and click the **Upload** button to submit the verification document for Service Center Representative review.

VERIFICATIONS

SUBMIT VERIFICATION

You can use this page to submit electronic copy of the required verification documents in order to ensure eligibility. [Click here](#) to know the contact address if in case you would like to submit the verification documents in person or by mail. Please submit all required verification documents within 30 days.

Manage Verifications

Submit Verification

Household Information

Name Juan Rodarte
Cell Phone Number
Email juanrodarte@email.com
Mailing Address 1234 5th St Sacramento Sacramento CA 95833
Preferred Communication Email

Required documents for Juan Rodarte

Document Category	Allowable Document(s)	Uploaded Document(s)	Upload	Status
Proof of Income	• Pay stub • Copy of last year's federal tax return that accurately reflects the current income • Signed letter from	• Rodarte pay stub.docx	Upload	Pending

UPLOAD DOCUMENTS

Upload Document

Documents Uploaded

Document Category	Document Type	Document Name	Uploaded Date	Action
Proof of Income	Pay stub	Rodarte pay stub.docx	07/11/14 12:38:33 PM	Remove View

Document Upload

Document Category *
Proof of Income

Document Type *
Pay stub

Document Name**
Browse... Upload

Close

Pay stub
Copy of last year's federal tax return that accurately reflects the current income
Signed letter from employer that displays the gross income, payment frequency, and date of paycheck
Affidavit
Other documents to support Proof of Earned Income
Form 1099
Bank statement
Investment account statement
Payment records (notes and mortgages)
Other documents to support Proof of Interest Income
Lease or sales agreement
Records such as gross rents and expense receipts
Copy of last year's federal tax return along with federal schedule E that accurately reflects current income
Other documents to support Proof of Rental Income
Receipts displaying gross profit and expenses
Business records such as profit and loss statements
Copy of last year's federal tax return along with federal schedule C, D, E, or F as appropriate that accurately reflects current income
Other documents to support Self Employment Income
Court papers
District Attorney/Family Support (DAFS) records
Copy of check
Copy of pay stub
Copy of pay stub showing garnishment specified for alimony
Sworn affidavit from absent parent
Other documents to support spousal income and child support
Award letter or most recent cost-of-living increase notice
Current bank statement
Copy of the current benefit check
Signed statement from the individual or organization providing the income
Copy of last year's federal tax return that accurately reflects current income

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- At the bottom of the *Submit Verification* page is the **Additional Information** section, where a comment can be added to communicate with the Service Center about the document just uploaded.

Once you have submitted the verification document, a Service Center Representative will review the document to finalize eligibility. Additional documentation may be requested or the applicant may be contacted about the documents provided. Communication from the Service Center to the applicant can be via the **Comments History** section shown here, or through the Preferred Communication Method (postal mail or CalHEERS secure mailbox).

Next Steps

A Service Center Representative reviews the verification documents and may need to follow up for questions or clarifications. If Covered California determines that an uploaded document is incorrect or otherwise does not address the required verification, the applicant or assister can use the **Withdraw** button to remove it.

The applicant can now view these uploaded documents from the *Manage Verifications* page. The applicant may click on **Edit** to edit the submission while it is unverified, or click on **Withdraw** to cancel submission of a document. The applicant can also click on **View** to display the document.

The screenshot shows a form titled "Additional Information". It contains a "Comments History" section with an empty text area. Below it is a "Comments *" section with a text area containing the text "I have uploaded my pay stub as proof of income." At the bottom of the form, there are four buttons: "Close", "Save and Exit", "Withdraw", and "Submit". The "Submit" button is highlighted with a red border.

The screenshot shows the "MANAGE VERIFICATIONS" page. It features a "Verifications History" table and a "Documents Uploaded" table. The "Verifications History" table has columns for Verification ID, Category, Submit Date, Status, Status Date, and Action. The "Documents Uploaded" table has columns for Person, Category, Type, Name, Uploaded, and Action. Both tables have "Edit" and "Withdraw" buttons for the first row in the history table, and a "View" button for the first row in the documents table. The "Edit" and "Withdraw" buttons in the history table and the "View" button in the documents table are highlighted with red borders.

Verification ID	Category	Submit Date	Status	Status Date	Action
140	Individual Eligibility Determination	06/25/2014	SUBMITTED	06/25/2014	Edit Withdraw

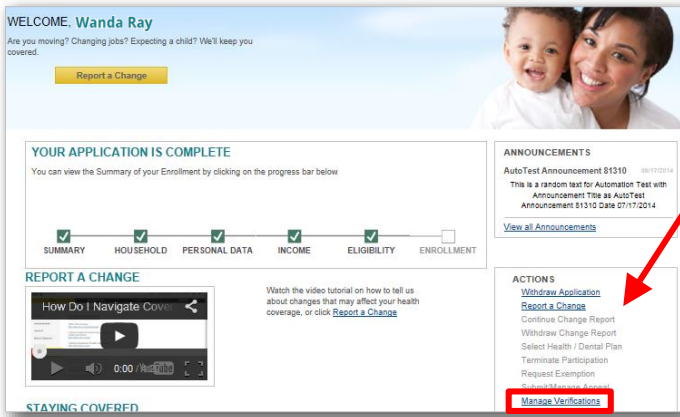
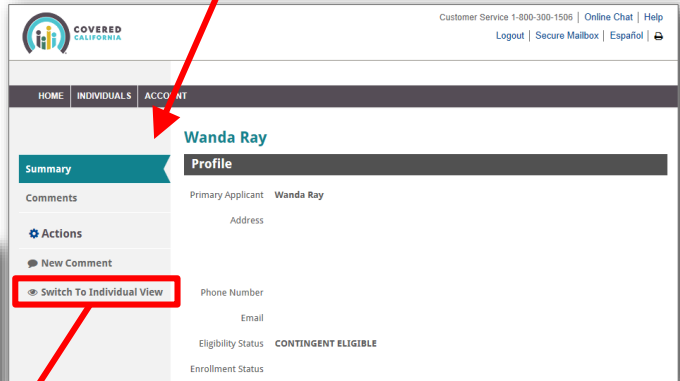
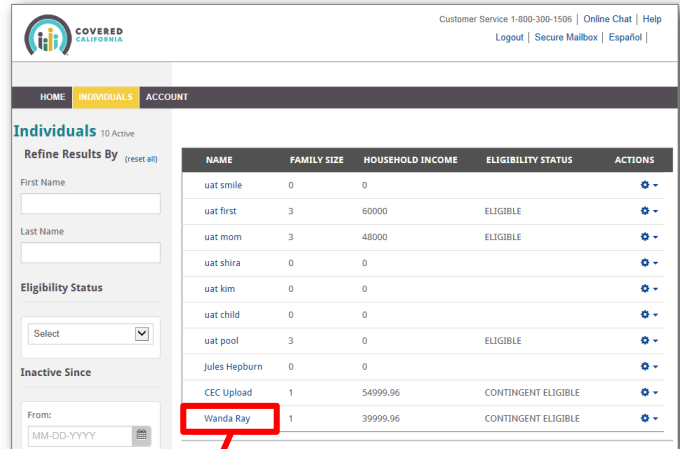
Person	Category	Type	Name	Uploaded	Action
Wanda Ray	Proof of Citizenship or Lawful Presence	U.S. Passport	SE NEW Marriage.docx	06/25/14 04:37:06 PM	View

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Navigating to the *Manage Verifications* Page (CEC or CIA View)

If you are a Certified Enrollment Counselor or a Certified Insurance Agent:

1. Login to the Covered California website and navigate to your home page.
2. Navigate to your *Active Individuals* Page.
3. Select the Individual who needs to upload Verification documents.
4. Click on the **Switch to Individual View** button to navigate to their home page.
5. Click on the **Manage Verifications** link in the **Actions** section to navigate to the *Manage Verifications* page.



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Navigating to the *Manage Verifications* Page (SCR or CEW View)

If you are a Service Center Representative or County Eligibility Worker:

1. Login to CalHEERS and navigate to your home page.
2. Click on the **Search Individual** link
3. Search for the Individual by Social Security Number, Combination Search, or other criteria.
4. Select the Individual who needs to upload Verification documents by clicking on the radio button next to their name.
5. The case appears below. Click on the **View Home** button to navigate to their home page.
6. Click on the **Manage Verifications** link in the Actions bar to navigate to the *Manage Verifications* page and continue with the instructions earlier in this document.

