

What information do I need to apply for a tax credit and to enroll in a plan?

Use this worksheet to help you collect the information you need to apply for a tax credit to lower your monthly costs, if you are eligible, and enroll in a health insurance plan that meets your needs and fits your budget

Checklist: Basic Family Information Needed To Apply for a Tax Credit

- Dates of birth and social security numbers for anyone applying for insurance
- Health insurance policy numbers for any current health plans
- Employer and income information for 2013 and estimated income for 2014 for everyone in the family
- Information about any job-related health insurance available to your family in 2014

Tax Credit Eligibility Confirmation Number & Amount

If you qualify for a tax credit after you apply over the phone or via paper application, you will receive a confirmation number that you will need to use when applying for a plan and the amount of tax credit that you are eligible for.

- Tax Credit Confirmation Number:** _____
- Tax Credit Amount (if eligible):** _____

Plan Selection

Once you have found a health insurance plan that works for you, write down the information here:

- Health Insurance Company Name:** _____
- Health Plan Name:** _____

Agent or Broker National Producer Number

If you worked with an agent or broker, record their national producer number and provide it when you enroll in coverage online, via phone or fill out Schedule C of the paper application.

- National Producer Number:** _____