



COVERED CALIFORNIA

Your destination for affordable, quality health care, including Medi-Cal

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:

1. 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.
2. 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 / Denial Plan](#)
- [Terminate Participation](#)
- [Request Exemption](#)
- [Submit Income Report](#)
- [Manage Verifications](#)

RESOURCES

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

MORE OPTIONS

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

Verification ID	Category	Submit Date	Status	Status Date	Action
165	Individual Eligibility Determination		INCOMPLETE	07/11/2014	View

Document Name	Category	Type	Name	Uploaded	Action
Roberto	Proof of Income	Pay stub	Roberto pay stub docs	07/11/14 12:38:33 PM	View

JOB AID: UPLOADING VERIFICATION DOCUMENTS

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.

The screenshot shows the 'SUBMIT VERIFICATION' page for Juan Rodarte. Under 'Required documents for Juan Rodarte', there is a table with columns: Document Category, Allowable Document(s), Uploaded Document(s), Upload, and Status. A document with category 'Proof of Income' and type 'Pay stub' is listed, with an 'Upload' link highlighted in a red box. An arrow points from this link to the 'UPLOAD DOCUMENTS' page, which shows a table of 'Documents uploaded' with columns: Document Category, Document Type, Document Name, Uploaded Date, and Action. A document with category 'Proof of Income' and type 'Pay stub' is listed, with a 'View' link. Another arrow points from the 'View' link to the 'Document Upload' popup, which has a 'Document Type' dropdown set to 'Pay stub' and an 'Upload' button highlighted in a red box. Below the popup is a list of allowable documents for 'Proof of Income', including 'Copy of last year's federal tax return that accurately reflects the current income', 'Investment accounts statement', 'Records such as gross rents and expense receipts', and 'Copy of current benefit check'.

JOB AID: UPLOADING VERIFICATION DOCUMENTS

8. 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.

Additional Information

You can use this section to provide additional information to support the uploaded documentation

Comments History

Comments *

I have uploaded my pay stub as proof of income.

The Exchange staff will review your documents. You will be notified of your eligibility results or if more information is required.

Close Save and Exit Withdraw **Submit**

VERIFICATIONS

MANAGE VERIFICATIONS

Select a row to see details below

Submit Verification

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

Verification Detail 140

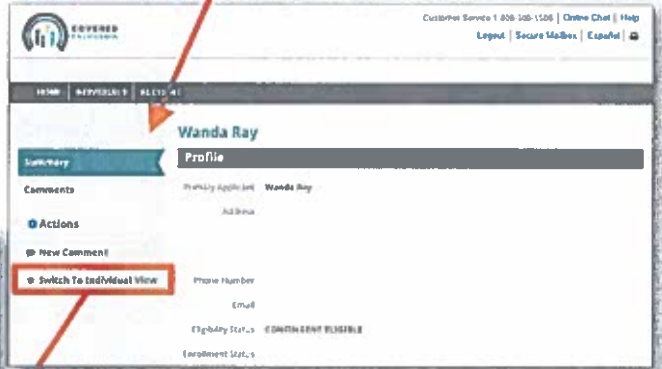
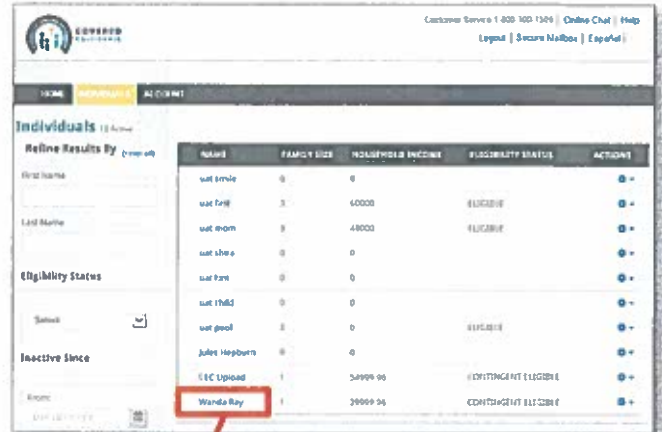
Documents Uploaded					
Person	Category	Type	Name	Uploaded	Action
Wanda Ray	Proof of Citizenship or Lawful Presence	US Passport	SE NEVY Marriage docx	06/25/14 04:37:06 PM	View

JOB AID: UPLOADING VERIFICATION DOCUMENTS

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.

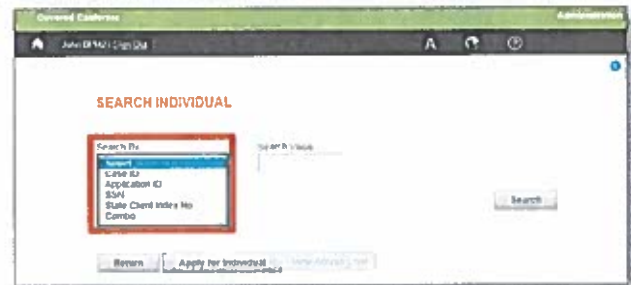
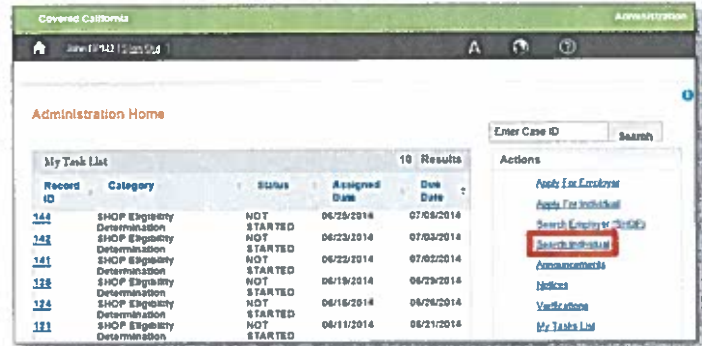


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Navigating to the *Manage Verifications* Page (SCR or CEW View)

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.



1 Results

Individual Name	SSN	Case ID	Application ID	State Client Index No.	Date of Birth	Case Status	Application Status
Juan Rodarte	8885	8000022001	1000022473	71561321H	01/01/1974	ACTIVE	SUBMITTED

