

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Visit: <https://www.CarewellSEIU503.org/enrollment-platform>

Enter Zip, Name, Email, & Phone Number. Click “see plans and prices”.

The screenshot shows the top navigation bar with the Valley Insurance Professionals logo on the left, contact information for Laura Beegle (NPN 17766024) in the center, and a 'Sign in' button on the right. The main content area features a light blue background with the heading 'Easily find an affordable health plan'. On the left, there is a form titled 'Enter your info to compare plans' with input fields for Zip, Name (optional), Email (optional), and Phone number (optional), followed by a blue 'See plans and prices' button and a disclaimer. On the right, a large circular graphic contains the Carewell SEIU503 logo and phone number (844-503-7348), along with a purple box listing three steps: 1. GATHER INFO, 2. COMPLETE ENROLLMENT, and 3. NEXT STEPS, each with a brief description. At the bottom of the circle is the Valley Insurance Professionals logo and phone number (503-974-8471).

Consumers: ☎ 503.974.8471 Español

VALLEY INSURANCE PROFESSIONALS Laura Beegle NPN 17766024 Sign in

## Easily find an affordable health plan

Enter your info to compare plans

\_\_\_\_ I

Name (optional)

Email (optional)

Phone number (optional)

**See plans and prices**

DISCLAIMER: By submitting your information you agree that Laura Beegle may contact you at the above-listed email or phone number. I understand that consent is not a condition of purchase.

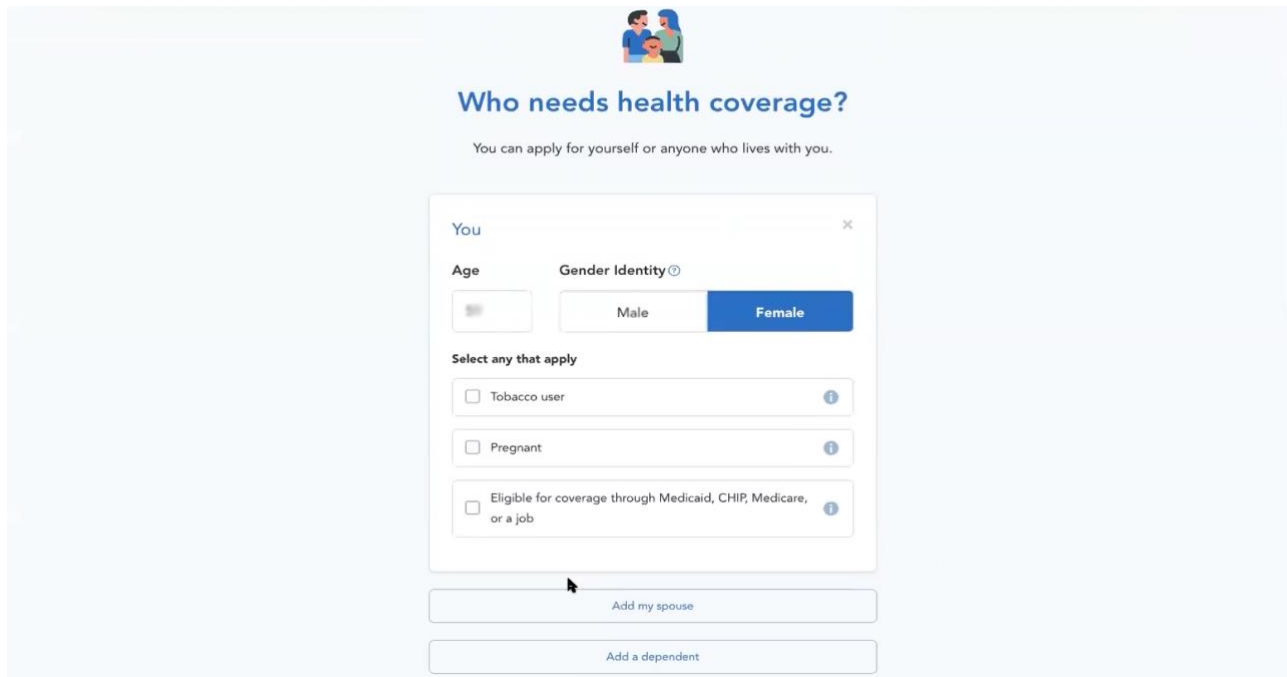
**Carewell SEIU503**  
844-503-7348

- 1. GATHER INFO**  
Before starting, make sure you have names, dates of birth, social security numbers and income information for all members of your tax filing household.
- 2. COMPLETE ENROLLMENT**  
REMEMBER: For assistance enrolling, visit [CarewellSEIU503.org](https://www.CarewellSEIU503.org) for a helpful guide. For your homecare & personal support work your employer should be listed as Consumer Client, 550 Capitol St NE, Salem, OR 97301, 877-867-0077. Healthcare Cost Assistance is NOT employer sponsored or group coverage.
- 3. NEXT STEPS**  
By completing your enrollment on this platform you do not need to complete the Enrollment Information Form to tell the Benefits Administration Office your new premium amount.  
*Please remember to pay your first month's premium before December 31<sup>st</sup> to ensure your insurance will start January 1, 2021.*

**VALLEY INSURANCE PROFESSIONALS**  
503-974-8471

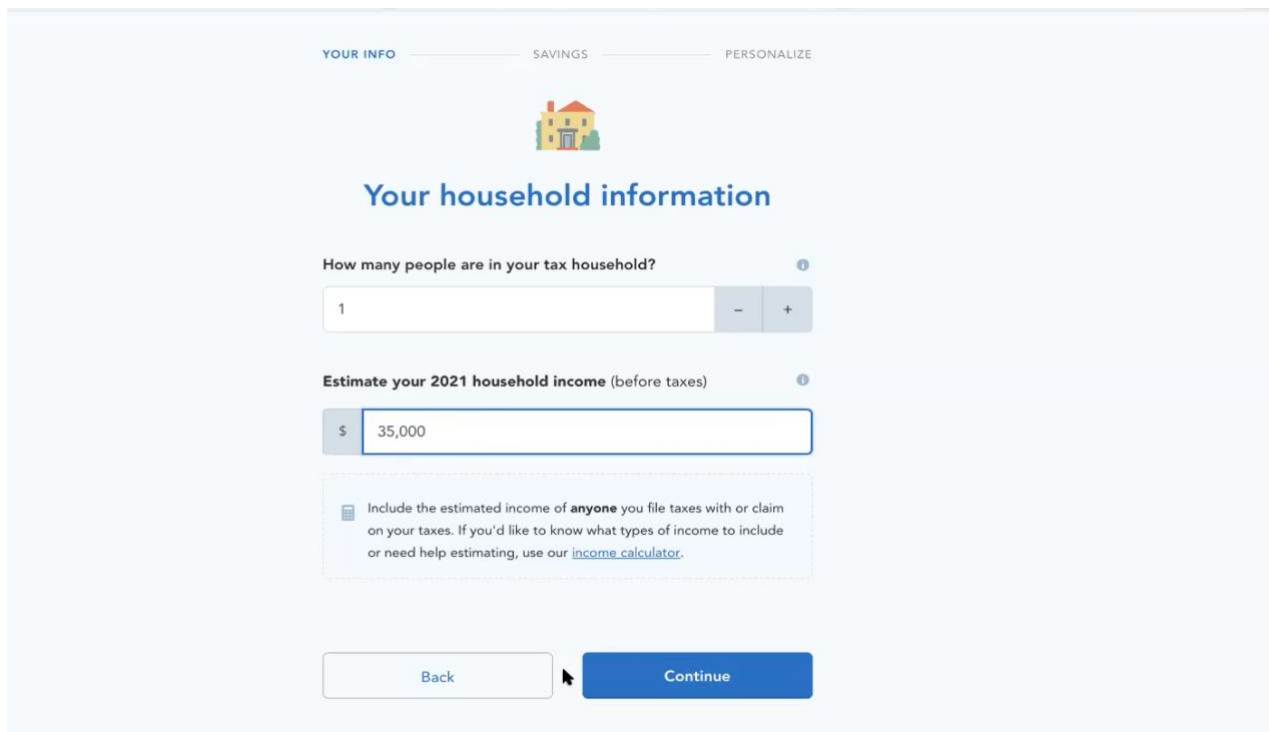
# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Add age and select gender. Are you a tobacco user? Pregnant? Eligible for other coverage? Add your spouse and/or dependent(s), everyone in your tax filing household, even if they are not enrolling. This is necessary to determine your household tax credits.



The screenshot shows a web form titled "Who needs health coverage?". At the top, there is an icon of a family and the text "You can apply for yourself or anyone who lives with you." Below this is a form for "You" with fields for "Age" (with a dropdown arrow), "Gender Identity" (with "Male" and "Female" buttons, "Female" is selected), and "Select any that apply" (with checkboxes for "Tobacco user", "Pregnant", and "Eligible for coverage through Medicaid, CHIP, Medicare, or a job"). At the bottom of the form are two buttons: "Add my spouse" and "Add a dependent".

How many people are in your household? Estimate your 2021 pretax income. This is just an estimate; later you will be asked more specific questions about your income.



The screenshot shows a web form titled "Your household information". At the top, there are three tabs: "YOUR INFO", "SAVINGS", and "PERSONALIZE". Below the tabs is an icon of a house and the title "Your household information". The form has two main sections: "How many people are in your tax household?" with a dropdown menu showing "1" and minus/plus buttons, and "Estimate your 2021 household income (before taxes)" with a text input field containing "\$ 35,000". Below the income field is a dashed box containing a note: "Include the estimated income of anyone you file taxes with or claim on your taxes. If you'd like to know what types of income to include or need help estimating, use our [income calculator](#)." At the bottom are two buttons: "Back" and "Continue".

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

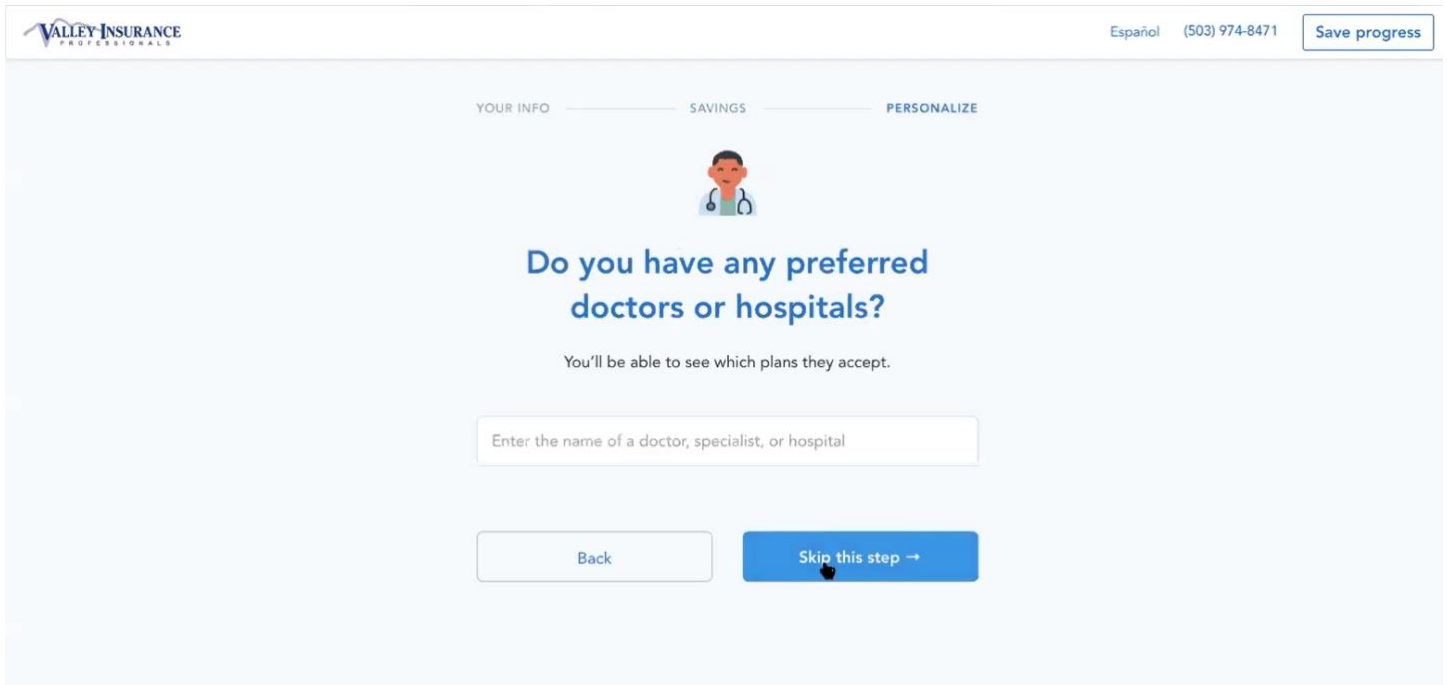
Based on your income and # of people in your household you may qualify for a savings in the form of tax credits as shown here. By the end of the application, you will get an exact amount of your Advanced Premium Tax Credits (APTC).

The screenshot shows the 'SAVINGS' step of an enrollment process. At the top left is the 'VALLEY INSURANCE PROFESSIONALS' logo. At the top right are links for 'Español', '(503) 974-8471', and 'Save progress'. The main navigation bar includes 'YOUR INFO', 'SAVINGS', and 'PERSONALIZE'. A pink piggy bank icon is centered above the heading 'You qualify for savings!'. Below this, a white box contains the text 'You'll **save** this much on your premium:' followed by '\$600/month' in large green font. A light blue box below that says '✔ This means you'll see plans as low as \$7 per month'. At the bottom of the white box, it states 'This is an initial estimate. You'll see your exact savings when you apply.' At the bottom of the page are two buttons: 'Back' and 'Continue'.

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

## SKIP THIS STEP BELOW

The enrollment platform will ask if you want to look for your preferred doctors, hospitals or if you want to review your medications. This is a great feature when comparing plans, however, to receive Healthcare Cost Assistance you must select the approved plan for your area. So, you can skip these steps.



The screenshot shows the Valley Insurance Professionals enrollment platform. At the top left is the logo, and at the top right are links for 'Español', '(503) 974-8471', and a 'Save progress' button. Below the header is a progress bar with three steps: 'YOUR INFO', 'SAVINGS', and 'PERSONALIZE'. The 'PERSONALIZE' step is active. The main content area features a doctor icon and the question 'Do you have any preferred doctors or hospitals?' in blue. Below this is a subtext: 'You'll be able to see which plans they accept.' A text input field contains the placeholder 'Enter the name of a doctor, specialist, or hospital'. At the bottom are two buttons: a white 'Back' button and a blue 'Skip this step →' button with a mouse cursor over it.

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Scroll to the list of carriers on the left side and uncheck all carriers EXCEPT YOUR OWN. You can find a list of the approved plan for your area at: [CarewellSEIU503.org/benefits/healthcare-cost-assistance/approved-plans/](http://CarewellSEIU503.org/benefits/healthcare-cost-assistance/approved-plans/)

The screenshot displays the 'Plan results' page for Valley Insurance Professionals. The interface includes a top navigation bar with the company logo, language options (Español), a phone number (503) 974-8471, and a 'Save progress' button. Below the navigation, there are filters for location (97301), a list of 1 carrier, a premium of \$35,000, and an 'Edit' option. On the right, there are links for 'Share', 'Print', and 'Cart'.

The main content area is titled 'Plan results' and is divided into two sections: 'Health' and 'Dental'. The 'Health' section shows a 'Savings' of \$600/mo and a 'Monthly premium max' of \$600. The 'Dental' section shows a 'Max deductible' of \$8,550. Below these are sections for 'Providers' (with an 'Add a doctor or hospital' button) and 'Usage estimate' (with a 'Low' selection).

The 'Carriers' section is highlighted with a red box and contains the following checked items:

- BridgeSpan Health Company
- Kaiser Permanente
- Moda Health
- PROVIDENCE HEALTH PLAN
- Regence BlueCross BlueShield of Oregon

The 'Metal levels' section includes 'Expanded Bronze', 'Silver', and 'Gold'. The 'Networks' section is partially visible at the bottom.

The main plan list shows 33 plans, with the 'Lowest premium plan' selected. The first plan is 'KP OR Bronze 8550/75 - EPO' (EXPANDED BRONZE) with a premium of \$7/mo (was \$607), a deductible of \$8,550/yr, and an out-of-pocket max of \$8,550. The second plan is 'KP Oregon Standard Bronze Plan - EPO' (EXPANDED BRONZE) with a premium of \$24/mo (was \$624), a deductible of \$6,900/yr, and an out-of-pocket max of \$6,900. The third plan is 'KP OR Bronze 6900/0% HSA - EPO' (EXPANDED BRONZE) with a premium of \$24/mo (was \$624), a deductible of \$6,900/yr, and an out-of-pocket max of \$6,900. Each plan card includes details for 'Doctor visits', 'Specialist visit', and 'Generic drugs', and has 'Compare', 'Plan details', and 'Add to cart' buttons.

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Next, select your metal level. All approved plans are Silver Level Plans. Then, look for the Trust approved plan for your area. You can look at the “Plan details”-or simply select “Add to cart” to move forward.

The screenshot displays the enrollment platform interface. On the left, there are filters for 'Usage estimate' (Low, Medium, High) and 'Carriers' (BridgeSpan Health Company, Kaiser Permanente, Moda Health, PROVIDENCE HEALTH PLAN, Regence BlueCross BlueShield of Oregon). Below these is a 'Metal levels' section with options for Expanded Bronze, Silver (selected), and Gold. The main area shows two plan cards. The top card is for Kaiser Permanente with a premium of \$266/mo and a deductible of \$3,650/yr. The bottom card is for Kaiser Permanente with a premium of \$296/mo and a deductible of \$2,500/yr. Both cards show 'Out-of-pocket max' of \$8,550 and list costs for Doctor visits, Specialist visits, and Generic drugs. Buttons for 'Compare', 'Plan details', and 'Add to cart' are visible for each plan.

You may be given the option to add a dental plan: remember that if you are eligible for Carewell SEIU 503 benefits, you already have premium free dental coverage through Kaiser Dental. You may still choose to add dental for you or a family member, however as a reminder, you cannot use your Benefit Convenience Card to pay for your dental plan. Next, select “Start application.”

The screenshot shows the enrollment platform with a 'Cart' modal open. The modal displays the selected plan: 'KP OR Silver 2500/40' with a premium of \$296/mo. Below this, it shows 'Total premium' as \$296/mo. There is an option to 'Add a dental plan' with a 'Shop dental' button. At the bottom of the modal are buttons for 'Continue shopping' and 'Start application'. The background shows the same plan selection interface as the previous screenshot, but it is dimmed.

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Read the following privacy notice statements and indicate that you agree by checking each box.

## Privacy statement

Here at HealthSherpa, we work with the Health Insurance Marketplace to help you get health coverage.

[Learn more about the Marketplace](#)

### Privacy and the use of your information

**Important Marketplace Emails:** If the Marketplace has your email address, they'll automatically send you important information, updates, and reminders about Marketplace enrollment. You can opt out of these communications at any time. To do this, click on the "unsubscribe" link in the footer of any Marketplace email.

**Privacy and the use of your information:** The Marketplace will keep your information private as required by law. Your answers on this form will only be used to determine eligibility for health coverage or help paying for coverage. The Marketplace will check your answers using the information in their databases and the databases of other federal agencies. If the information doesn't match, the Marketplace may ask you to send them proof. The Marketplace won't ask any questions about your medical history. Household

To continue, you must agree and check each of the following statements:

I agree to have my information used and retrieved from data sources for this application. I have  consent for all people I'll list on the application for their information to be retrieved and used from data sources.

I understand that I'm required to provide true answers and that I may be asked to provide  additional information, including proof of my eligibility for a Special Enrollment Period if I qualify. If I don't, I may face penalties, including the risk of losing my eligibility for coverage.

Back

Continue

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Fill in your personal information and click Continue.

The screenshot shows the Valley Insurance Professionals enrollment platform. At the top left is the logo, and at the top right are links for 'Español', '(503) 974-8471', and 'Save progress'. The main content area is titled 'Primary contact' and contains a sidebar with navigation options: 'Primary contact', 'Your information', 'Home address', 'Contact details', 'Verify identity', 'Household', 'Members', 'Additional questions', and 'Finalize'. The 'Your information' section is active and contains the following fields: 'First name' (text input), 'Middle (Optional)' (text input), 'Last name' (text input), 'Suffix (Optional)' (dropdown menu), 'Date of birth' (text input with format MM/DD/YYYY), and 'Sex' (radio buttons for Male and Female). Below these is a section for 'What is your Social Security Number (SSN)? (Optional)' with a text input field and a note: 'This helps us verify your identity. If you're applying for coverage and have an SSN, enter it here now, or you may not be able to proceed. If you don't have an SSN, leave this field blank.' At the bottom of the form are 'Back' and 'Continue' buttons.

Continue to fill in your personal information (address, email, etc.) and click Continue on each page.



# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

In this step, the Enrollment Platform connects to the Marketplace to verify your identity. This is designed to ensure your privacy, so they can verify you are the real person applying.

VALLEY INSURANCE PROFESSIONALS

Español (503) 974-8471 Save progress

**Primary contact**

- Your information ✓
- Home address ✓
- Contact details ✓
- Verify identity**
- Household
- Members
- Additional questions
- Finalize

**Need help?**  
Our team of experts can help you finalize your enrollment.  
[\(503\) 974-8471](tel:5039748471)

## Verify identity

Please verify your identity by answering the questions below. If you have an existing application in Healthcare.gov, we will pre-fill the rest of this application from it.

### Fetching questions

Back Continue

You will be asked to respond to a series of questions to determine your identity. Some will not have a correct answer. If that happens, select None of these above/Does not apply.

VALLEY INSURANCE PROFESSIONALS

Español (503) 974-8471 Save progress

**Primary contact**

- Your information ✓
- Home address ✓
- Contact details ✓
- Verify identity**
- Household
- Members
- Additional questions
- Finalize

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[\(503\) 974-8471](tel:5039748471)

## Verify identity

Please verify your identity by answering the questions below. If you have an existing application in Healthcare.gov, we will pre-fill the rest of this application from it.

Which one of the following retail credit cards do you have? If there is not a matched retail credit card, please select 'NONE OF THE ABOVE':

- Dry Creek Mercantile
- Bencraft
- Boot Barn
- Mikasa
- None of the Above/Does Not Apply

According to your credit profile, you may have opened an auto loan in or around September 2020. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY':

- Transamerica

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Next, the Enrollment Platform will connect to the automatically generated application from your 2020 enrollment, if you have one. **Once this step is complete, you must finish your application, or you risk not auto-renewing into health insurance for 2021.**

The screenshot shows the Valley Insurance Professionals enrollment platform. At the top left is the logo. At the top right are links for 'Español', '(503) 974-8471', and 'Save progress'. On the left is a navigation menu with options: 'Primary contact', 'Household', 'Members', 'Additional questions', and 'Finalize'. Below the menu is a 'Need help?' section with the text 'Our team of experts can help you finalize your enrollment.' and the phone number '(503) 974-8471'. The main content area is titled 'Checking HealthCare.gov' and includes the text 'We're syncing with HealthCare.gov to ensure we have the most up-to-date information for you'. A large white box in the center contains the heading 'Syncing with HealthCare.gov', a circular progress indicator, and two buttons: 'Back' and 'Continue'.

Some of the answers may already be filled in from your 2020 enrollment. Please review the answers, update as necessary, and click Continue.

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Primary contact

## Household

### Household

Who's applying?

Residence

Tax household

Additional information

Members

Income

Additional questions

Finalize

### Need help?

Our team of experts can help you finalize your enrollment.

[\(503\) 974-8471](tel:(503)974-8471)

### Who's applying for coverage?

Is \_\_\_\_\_ applying for coverage?

Yes

No

Do you want to see if you are eligible for cost savings?

Yes

No

Who else is applying for coverage? ⓘ

+ Add spouse

+ Add another person

Back

Continue

Primary contact

## Residence

### Household

Who's applying?

Residence

Tax household

Additional information

Members

Income

Additional questions

Finalize

### Applicant addresses

Does everyone applying for coverage live with you at the following address?

Yes

No

Back

Continue

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Next you can add or remove a previous spouse or dependent. If you are no longer claiming someone as a dependent for 2021, you can remove them at this step. If you are unsure, leave them on the application and proceed forward. Afterwards, contact your Carewell Benefits Team to schedule an appointment with a Valley Insurance Professionals Agent for after Open Enrollment, to review/update your household information.

The screenshot displays the 'Finalize' step of the enrollment process. On the left, a sidebar titled 'Finalize' contains a 'Need help?' section with the text: 'Our team of experts can help you finalize your enrollment.' and a phone number '(503) 974-8471'. The main content area is titled 'Are you claiming any dependents on your taxes for 2021?' and features two radio buttons: 'Yes' (selected) and 'No'. Below this, it asks 'Who are these dependents?' and 'Please provide information about anyone else you will claim as a dependent:'. A form for adding a dependent includes fields for 'First name', 'Middle (Optional)', 'Last name', and 'Suffix (Optional)'. The 'Date of birth' is entered as 'MM/DD/YYYY'. The 'Sex' is selected as 'Male'. The 'Relationship to you' is selected as 'Select'. A question 'Does this person live with you?' has 'No' selected. A '+ Add dependent' button is at the bottom of the form. At the very bottom of the page are 'Back' and 'Continue' buttons.

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Continue to answer questions about your household. Remember, these questions are for what you expect for next year, 2021.

Primary contact

Household

Who's applying?

Residence

**Tax household**

Additional information

Members

Income

Additional questions

Finalize

**Need help?**  
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[\(503\) 974-8471](tel:5039748471)

## Household

### Your tax information

Are you married?

Yes  No

Do you plan to file a federal income tax return for 2021?  
You don't have to file taxes to apply for coverage, but you'll need to file next year if you want to get a premium tax credit to help pay for coverage now.

Yes  No

Are you claiming any dependents on your taxes for 2021?

Yes  No

Will you be claimed as a tax dependent by someone else for 2021?

Yes  No

If you do not live with someone under 19, then select no.

VALLEY INSURANCE PROFESSIONALS

Español (503) 974-8471

Primary contact

Household

Additional information

**Other family relationships**

Members

Income

Additional questions

Finalize

**Need help?**

## Additional Relationship Information

### Other relationships for [redacted]

Does [redacted] live with someone under the age of 19?

Yes  No

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Please enter your full Social Security Number and answer all questions below. The questions about race/ethnicity are optional and do not need to be answered.

This screenshot shows the 'Your Information' section of an enrollment form. On the left, a sidebar contains a progress indicator with steps: 'Additional information' (checked), 'Members', 'Income', 'Additional questions', and 'Finalize'. A 'Need help?' box is also present. The main form area includes the following questions and options:

- What is your Social Security Number (SSN)?** (Optional)  
Enter your 9-digit SSN. We verify the SSN with Social Security based on the consent you gave at the start of the application.  
  
 I don't have a SSN
- Have you used tobacco 4 or more times a week in the past 6 months?** (Optional)  
 Yes  No
- Are you a US citizen or US national?** (Optional)  
 Yes  No
- Are you currently incarcerated (detained or jailed)?** (Optional)  
 Yes  No
- Are you an American Indian or Alaska Native?** (Optional)  
 Yes  No
- is [redacted] of Hispanic, Latino, or Spanish origin?** (Optional)

This screenshot shows the 'Applicants' section of the enrollment form. The top navigation bar includes the 'VALLEY INSURANCE PROFESSIONALS' logo, a language selector for 'Español', a phone number '(503) 974-8471', and a 'Save progress' button. The left sidebar shows a progress indicator with steps: 'Primary contact' (checked), 'Household' (checked), 'Additional information' (checked), 'Members', 'Income', 'Additional questions', and 'Finalize'. A 'Need help?' box is also present. The main form area includes the following questions and options:

- Your Information**
- Is [redacted] a naturalized or derived citizen?** (Optional)  
 Yes  No
- Is [redacted] pregnant?** (Optional)  
 Yes  No
- Buttons:** 'Back' and 'Continue'

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

The Income section is very important. The information here is used to calculate your tax credits, based on household size and the federally taxable income for everyone included on your federal taxes.

Please note: The employer for your homecare or personal support work should be listed as: Consumer Client, 550 Capitol St, NE, Salem OR 97301, 1-877-867-0077.

If your household has more than one income source, please list each one separately, by clicking on Add New Income Source. The Marketplace will compare the information you provide to the information on your taxes.

Household ✓

Additional information ✓

Members ✓

**Income**

Additional questions

Finalize

**Need help?**  
Our team of experts can help you finalize your enrollment.  
[\(503\) 974-8471](tel:(503)974-8471)

To determine if you're eligible for savings, we need to ask about your income. Click to view a list of acceptable types. [View list](#) ▾

**Current income for** [redacted]

Does [redacted] currently get any income?

Yes  No

Tell us about any income [redacted] will have this month. ⓘ

Type	How much	
Job / Consumer Client	\$33,789.00 per year	<a href="#">Remove all</a> <a href="#">Edit</a> <a href="#">Remove</a>

[Add new income source](#)

**Deductions for** [redacted]

Does [redacted] have any deductions for 2021?

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Click on select "income type", to add any additional income ex. (rental income). Again, only include income that is federally taxable.

**Need help?**  
Our team of experts can help you finalize your enrollment.  
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Tell us about any income [redacted] will have this month. ⓘ

Type	How much	Remove all
Job / Consumer Client	\$33,789.00 per year	Edit Remove

Select an income type

Select

- Alimony
- Social Security
- Retirement
- Pension
- Cash support
- Capital Gains
- Investment
- Rental or royalty

After adding income, add any deductions you claim on your federal taxes. For example, student loan interest, alimony or Roth IRA contributions.

**Amount**  **How often**

---

**Deductions for** [redacted]

Does [redacted] have any deductions for 2021?

Yes  No

---

Yearly income for [redacted]



# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Review all of your income and deduction amounts before moving forward.

Please note: It is okay to estimate your income a little bit higher so that you are not responsible for repaying any tax credits if you have underestimated your income and received too many tax credits.

If you find later that you need to update your income, contact your Carewell Benefits Team to schedule an income update appointment with a Valley Insurance Professionals agent.

**Need help?**  
Our team of experts can help you finalize your enrollment.  
[\(503\) 974-8471](tel:(503)974-8471)

Tell us about any income [redacted] will have this month. ⓘ

Type	How much	
Job / Consumer Client	\$33,789.00 per year	<a href="#">Edit</a> <a href="#">Remove</a>
Rental or royalty	\$8,400.00 per year	<a href="#">Edit</a> <a href="#">Remove</a>

[Remove all](#)

[Add new income source](#)

**Deductions for [redacted]**

Does [redacted] have any deductions for 2021?

Yes  No

**Yearly income for [redacted]**

Based on what you entered, [redacted] income minus any deductions for 2021 will be about **\$42,189.00**.  
Is this correct? ⓘ

Yes  No

[Back](#) [Continue](#)

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Continue to answer the additional questions about you and your household.

VALLEY INSURANCE PROFESSIONALS

Español (503) 974-8471 Save progress

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

**Additional questions**

**Extra help**

Coverage

Employer coverage

Additional questions

Finalize

**Need help?**  
Our team of experts can help you finalize your enrollment.

### Additional questions

#### Extra help

Do any of these people have a disability or mental health condition that limits their ability to work, attend school, or take care of their daily needs? (Optional) ⓘ

[ ]

Do any of these people need help with daily activities (like dressing or using the bathroom), or live in a medical facility or nursing home? (Optional) ⓘ

[ ]

#### Additional coverage questions

Were any of these people found not eligible for Medicaid or the Children's Health Insurance Program in the past 90 days? ⓘ

[ ]

Existing Coverage Information: If you are re-enrolling, then you should select Yes. If you are currently uninsured, then select No.

VALLEY INSURANCE PROFESSIONALS

Español (503) 974-8471 Save progress

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

**Additional questions**

### Additional questions

#### Existing coverage information

Is [ ] currently enrolled in health coverage?  
Select "No" if you're currently enrolled but know your coverage will end on or before 12/31/2020. ⓘ

Yes  No

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

If you are re-enrolling through the Marketplace; then select the box indicated below [“Individual insurance (including Marketplace or private market non-group coverage)”]

Extra help

**Coverage**

Employer coverage

Additional questions

Finalize

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What type of coverage does [redacted] have? (Select all that apply.)

- Medicaid ⓘ
- Children's Health Insurance Program (CHIP) ⓘ
- Medicare ⓘ
- TRICARE (Don't check this if this person has Direct Care or Line of Duty.) ⓘ
- VA health care program ⓘ
- Peace Corps ⓘ
- Individual insurance (including Marketplace or private market non-group coverage)
- COBRA
- Coverage through a job (or another person's job, like a spouse or parent)
- Retiree plan coverage
- Other Coverage

The following questions are new this year.

PLEASE NOTE: Carewell SEIU 503 Healthcare Cost Assistance is NOT an HRA. If you have an HRA through another employer, you can check the boxes, otherwise, leave these boxes blank.

Before you start this section, gather HRA information.

You'll need any information about Health Reimbursement Arrangements (HRAs) that the people on this application may have gotten from an employer.

Do any of these people have an individual coverage HRA through their job, or through the job of another person like a spouse or parent? ⓘ

[Learn more](#)

[redacted]

Have any of these people been offered an individual coverage HRA they haven't yet accepted through their job, or through the job of another person, like a spouse or parent? ⓘ

Only select a person's name if the person will be able to use their individual coverage HRA through 12/31/2020, or by January 1st if applying during Open Enrollment.

[redacted]

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Has anything changed in your life in the last 60 days? If no, leave the boxes blank. Like the HRA question above, Carewell SEIU 503 Healthcare Cost Assistance is NOT an ICHRA or a QSEHRA. If you have an ICHRA or a QSEHRA through another employer, you can check the boxes, otherwise, leave these boxes blank.

The screenshot displays a web interface for an enrollment platform. On the left, a sidebar contains a navigation menu with items: 'Additional information' (checked), 'Members' (checked), 'Income' (checked), 'Additional questions' (with sub-items 'Extra help' and 'Coverage', both checked), and 'Finalize'. A 'Need help?' box is also present, offering assistance from experts and providing the phone number (503) 974-8471. The main content area is titled 'Upcoming changes' and asks, 'Will anyone lose qualifying health coverage before 12/31/2020?'. Below this is a text box for a response. The 'Recent changes' section asks to 'Select any of the life changes that apply to any of the applicants. This must have taken place within the last 60 days (since 9/2/2020)'. It lists five options with checkboxes: 'Lost qualifying health coverage', 'Got married', 'Changed primary place of living', 'Released from incarceration (detention or jail)', and 'Adopted, placed for adoption, or placed for foster care'. At the bottom, there is a question about whether anyone has been offered an Individual Coverage Health Reimbursement Arrangement (ICHRA) or a Qualified Small Employer Health Reimbursement Arrangement (QSEHRA) with a start date between 9/2/2020 and 12/31/2020.

Next, review all of your information to make sure it is correct. If you need to make any changes, click the edit button in the upper right-hand corner.

The screenshot shows the 'Finalize' step of the enrollment process. The left sidebar now includes 'Finalize' with sub-items: 'Review' (highlighted), 'Agreements', 'Tax attestation', and 'Sign and submit'. The main content area is titled 'Finalize' and includes a 'Print' button. A message states: 'Take a few minutes to review the information you gave us and make any changes, if necessary.' Below this is a 'Primary contact' review form with an 'Edit' button. The form fields are: 'Full name:', 'Address:', 'Phone number:', 'Email:', 'Get updates by email: Yes', 'Preferred written language: English', and 'Preferred spoken language: English'. A mouse cursor is visible over the 'Edit' button.

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Please read and confirm your agreement to the statements below.

Renewal of Coverage: Selecting “I agree” allows you to auto renew each year. Selecting “I disagree” means you must actively re-enroll every year, or you will not have health insurance the following year.

The screenshot shows the Valley Insurance enrollment platform interface. At the top left is the Valley Insurance Professionals logo. At the top right are links for 'Español', the phone number '(503) 974-8471', and a 'Save progress' button. On the left side, there is a vertical navigation menu with the following items: 'Primary contact', 'Household', 'Additional information', 'Members', 'Income', 'Additional questions', 'Finalize', 'Review', 'Agreements' (highlighted in blue), 'Tax attestation', and 'Sign and submit'. Each item has a checkmark icon. Below the menu is a 'Need help?' section with the text: 'Our team of experts can help you finalize your enrollment.' The main content area is titled 'Finalize' and contains three sections: 1. 'Agreements' with the instruction 'Please read the attestations below and select a response for each statement.' 2. 'Renewal of coverage' with the text: 'To make it easier to determine my eligibility for help paying for coverage in future years, I agree to allow the Marketplace to use my income data, including information from tax returns, for the next 5 years. The Marketplace will send me a notice, let me make any changes, and I can opt out at any time.' Below this text are two radio button options: 'I agree' (selected) and 'I disagree'. 3. 'Tax filer attestation' with the text: 'Did  reconcile premium tax credits on their tax return for any past years? (Optional)'. Below this is a link: '[Learn more about reconciling premium tax credits.](#)'. At the bottom, it says 'Check the box below if all these apply to you:' followed by a bullet point: '• You got premium tax credits to help pay for Marketplace coverage.'

**Tax Filer Attestation:** To receive tax credits, you must reconcile the amount you receive, each year when you file your taxes. In this section you are stating that you intend to follow these rules in order to receive the premium tax credits. If your income changes throughout the year, please contact the Carewell Benefits team to schedule an appointment with a Valley Insurance Professionals agent to update your application.

*Please note: If you need tax advice you may contact the EAP for free tax advice for up to 3-4 sessions/issue. The Carewell SEIU 503 Employee Assistance Program (EAP) provides resources to help you in your personal life, such as accessing discounted legal services and household finance advice or counseling. For more information on the Employee Assistance Program, please contact the Carewell Benefits Team.*

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Read through the following statements and select agree or disagree; then, sign and submit.

The screenshot shows the 'Sign and submit' step of the enrollment process. On the left, a navigation menu lists various steps: 'Additional information', 'Members', 'Income', 'Additional questions', 'Finalize', 'Review', 'Agreements', 'Tax attestation', and 'Sign and submit'. A 'Need help?' box provides contact information: '(503) 974-8471'. The main content area is titled 'Sign and submit' and includes a 'Please read the attestations below and select a response for each statement.' instruction. The first statement is: 'I know that I must tell the program I'll be enrolled in if information I listed on this application changes. I know I can make changes in my Marketplace account or by calling the Marketplace Call Center at 1-800-318-2596 (TTY: 1-855-889-4325). I know a change in my information could affect eligibility for member(s) of my household.' Below this statement are two radio button options: 'Agree' (selected) and 'Disagree'. The second statement is: 'If anyone on your application is enrolled in Marketplace coverage and is later found to have other qualifying health coverage (like Medicare, Medicaid, or CHIP), the Marketplace will automatically end their Marketplace plan coverage. This will help make sure that anyone who's found to have other qualifying coverage won't stay enrolled in Marketplace coverage and have to pay full cost.' Below this statement are two radio button options: 'I agree to allow the Marketplace to end the Marketplace coverage of the people on my application in this situation.' (selected) and 'I don't give the Marketplace permission to end Marketplace coverage in this situation. I understand that the affected people on my application will no longer be eligible for financial help and must pay full cost for their Marketplace plan.' Below the statements is a 'Sign' section with the text: 'I'm signing this application under penalty of perjury, which means I've provided true answers to all of the questions to the best of my knowledge. I know I may be subject to penalties under federal law if I intentionally provide false information.' Below this text are two radio button options: 'Agree' (selected) and 'Disagree'.

Next, the Enrollment Platform connects to the Marketplace to retrieve your Eligibility results.

The screenshot shows the 'Retrieving final eligibility results from HealthCare.gov' step. The top left corner features the 'VALLEY INSURANCE PROFESSIONALS' logo. The top right corner has 'Español', '(503) 974-8471', and a 'Save progress' button. The left navigation menu lists: 'Primary contact', 'Household', 'Additional information', 'Members', 'Income', 'Additional questions', and 'Finalize'. A 'Need help?' box provides contact information: '(503) 974-8471'. The main content area is titled 'Retrieving final eligibility results from HealthCare.gov' and includes the text: 'We're currently syncing with HealthCare.gov to retrieve your final eligibility results. This can take a few minutes.' Below this text is a large box with the title 'Requesting eligibility results' and a progress bar that is approximately 25% full. Below the progress bar are two buttons: 'Back' and a button with a circular arrow icon.

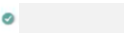
# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

To complete your enrollment, you must download your eligibility letter. Please review this notice to see if the Marketplace is requesting any documentation.

**Review eligibility results**

Before completing your enrollment, please do a final review of your eligibility results.

**Applicants**

Name	Eligibility
	Eligible to enroll in a Marketplace plan Eligible for a tax credit

Your household qualifies for a **total monthly tax credit of \$519**.

For more details on your eligibility, download the official letter here. **You must download this document to finish your enrollment.**

[Download Eligibility Letter](#)

Review this information. Write down your premium amount so you can pay that amount to your insurance carrier. Select Yes, to use the full amount of your tax credit. Then click “Enroll.”

**Confirm your plan**

Based on your eligibility results, here's what your plan will look like.

<b>Who's enrolling?</b> John Doe New <input checked="" type="checkbox"/>	<b>Kaiser Permanente</b> KP OR Silver 2500/40 Silver <b>\$377.00</b> MONTHLY FOR HOUSEHOLD
<b>Coverage begins</b> 1/1/2021	

Expected a different eligibility or subsidy? [Edit my details.](#)

Original	\$896.00
Subsidy	– \$519.00
<b>You pay</b>	<b>\$377.00</b>
<b>Deductible</b> Per Person	<b>\$2,500</b>
<b>Max Out of Pocket</b> Per Person	<b>\$8,550</b>

Would you like to use the full amount of your tax credit?

YES  NO

[Back](#) [Enroll](#)

# OPEN ENROLLMENT STEP BY STEP USING THE ENROLLMENT PLATFORM

Congratulations! Now that you have completed your enrollment you can go ahead and set up your monthly premium payments with your Insurance Carrier after December 15, 2020.

The screenshot shows the top navigation bar with the Valley Insurance Professionals logo on the left, the user name 'Laura Beegle' and ID 'NPN 17766024' in the center, and language options 'Español', contact '(503) 974-8471', and a 'Sign in' link on the right. Below the navigation bar is a light blue banner with a message: 'A verification email has been sent to your email. Please click the link to claim this application.' The main content area features a large blue heading 'Congratulations!' followed by 'You've enrolled in Marketplace coverage through HealthSherpa'. Underneath, the question 'What should I do now?' is followed by a numbered list item: '1 Make your first premium payment of **\$377.00** by **12/31/2020** by clicking the "Pay Premium" button below'. To the right of this list is a white box with the Kaiser Permanente logo, the plan name 'KP OR Silver 2500/40', and the premium amount '**\$377.00/mo**'.

You should also receive an email that says Congratulations, next step is to pay your bill.