

Documents and Information to bring to appointment:

For a CMS (Centers for Medicare & Medicaid Services) Navigator appointment, bring personal and household information like **Social Security numbers, dates of birth, and government-issued ID**. You should also gather income documentation such as **W-2s, recent pay stubs, and tax returns**, along with documents for **other household income**. Prepare immigration documents for non-citizens and a list of your current health plan information if you have it.

Personal and household information

- ☐ Social Security numbers for everyone in the household (numbers only)
- ☐ Dates of birth for everyone in the household
- ☐ Government-issued ID, such as a driver's license or Tribal ID
- ☐ Proof of legal residency or immigration documents (e.g., Green Card) for non-citizens

Income information

- ☐ Your most recent federal tax return (Form 1040)
- ☐ W-2 forms from employers
- ☐ Recent pay stubs (two are often sufficient)
- ☐ Information on other sources of income, such as Social Security, unemployment, or self-employment
- ☐ A reasonable estimate of your projected household income for the next year
- ☐ Documents related to any other income sources, like profits from stocks or real estate sales

Health and coverage information

- ☐ Your current health insurance plan information, including plan ID numbers and contact details
- ☐ A list of current medications and any past significant illnesses or operations
- ☐ Information on previous healthcare coverage, if applicable

Healthcare.gov Information

Email address/user login: _____

User login password: _____

Marketplace ID Number: _____