



Data Matching Checklist

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Help consumers provide accurate information

- Make sure there are no errors or typos in the application.
- Confirm all members of the household applying for coverage have provided accurate Social Security Numbers (SSNs), *if they have one*. Remember, non-applicants (other than the tax filer) aren't required to provide their SSNs but they are strongly encouraged to do so, if possible.
- Review projected income to make sure it's as accurate as possible.
- Remind consumers to report any changes in income or other application information within 30 days of the change.
- Make sure document types/document numbers/ID numbers are included for immigration documents, as applicable.

Think a consumer may have a data matching issue? Help them learn if they do.

- Read the full eligibility notice from a Marketplace. If a consumer has a data matching issue, the notice will say, "Send the Marketplace more information" or "You must submit documents." The eligibility notice will list what documents the consumer can submit to resolve the data matching issue. It's important to identify which members of the household have data matching issues that need to be resolved.
- Consumers can also determine whether they have a data matching issue by checking the **Application Details** section of their Marketplace accounts for a list of all issues that they may be able to resolve by submitting documents.
- Consumers with data matching issues will also receive reminder notices requesting documentation.

Confirmed that a consumer has a data matching issue? Help them resolve it.

- Remember, not every document consumers may want to upload is included in the drop-down list of **Document Types** viewable after clicking **Upload Documents** in the **Application Details** tab in their application. Each list includes a link to a full list of documents the consumer can send. If they need to upload a document that's not listed, they can choose **Other** from the drop-down menu.
- Encourage consumers to upload their documents instead of mailing them to resolve their inconsistency faster. If the document is successfully uploaded, the **Upload Documents** button will change to **Upload More Documents**. The consumer can submit multiple documents for a single issue, if needed.
- Ensure the documents consumers submit electronically are in one of the following formats: .pdf, .jpeg, .jpg, .gif, .xml, .png, .tiff, or .bmp and are no larger than 10MB.
- Double check that the file name on each of the consumer's electronic documents does not include any of the following: a colon, semi-colon, asterisk, or any other special character. Here are a few examples of special characters that can't be in the file name: \:*?<>|
- If consumers do mail in documents, tell them to send copies, not originals, and to include the following on any documentation they are submitting: a copy of the bar code page from their notice (if applicable), their name, state, and application ID.
- After submitting documentation, consumers will receive notification from the Marketplace about whether their data matching issue is resolved or requires additional documentation. They can also call the Marketplace Call Center to see if their data matching issue is resolved or if additional documentation may be required.
- Be aware: each eligibility notice with a data matching issue includes deadlines for the consumer to submit documents. In most cases, consumers have 90 days from the date of their eligibility notice to submit acceptable documents before action is taken. Even if the date has passed, they may still submit documentation.