

HEALTH INSURANCE CHECKLIST



Stay organized and avoid delays with this step-by-step checklist.

Start With Your Needs

Healthcare usage

Consider how often you typically visit doctors or specialists

Preferred providers

Identify doctors, hospitals, or facilities you want access to

Prescription needs

Review any medications you currently take

Future considerations

Think about upcoming needs like family planning or ongoing care

Prepare Before Enrolling

Personal information

Social Security numbers, green cards, or proof of citizenship for all applicants (if applicable)

Income details (if seeking savings on your plan)

Estimated annual household income and employer information; additional documentation may be requested if needed

Current coverage

Existing policy information

Provider and medication lists

For easy comparison across plans

Key Reminder

Choosing the right plan starts with understanding your needs—not just comparing prices.