oscar

OE27 Broker Readiness Checklist

Key steps to help clients complete authorization and identity verification.

What you can do before October 12th:

- [ ] Ensure each application includes the member's current phone number, email address and mailing address. ***After October 12th, you won't be able to make contact information changes on behalf of your member.***
- [ ] Confirm your client can receive and respond to a message within 15 minutes to facilitate broker authorizations.
- [ ] ID proof your clients now, where possible. Use the consumer's account on the EDE platform when available so the proofing credential can be reused.

What you can do after October 12th:

Before the appointment, ask members to have:

- Access to their Marketplace phone/email
- Current home mailing address
- DOB and household details
- Income and proof documents
- Time for secure verification

During the appointment:

- Confirm consent first
- Confirm contact information
- Tell members to respond to codes, links, or ID prompts
- Let the member complete verification
- No prompt? Check contact info and follow EDE to resend steps
- Proofing failed? Follow the Experian or HealthCare.gov manual review step

What you can tell your members via email or SMS:

Respond quickly to any secure code, link, text, email, or call so I can submit or update your Marketplace application. I can guide you, but you must complete the identity check yourself.