

Massachusetts Application for Health and Dental Coverage and Help Paying Costs— Additional Persons



Primary Contact from Step 1

STEP 2 Person ____ . Use this Additional Persons form if you have more than four people to include with this application. When filling out the additional pages please be sure to tell us how each person is related to each other person on the application. We need this information to determine eligibility.

1. First name, middle name, last name, and suffix

2. Relationship to Person 1	Relationship to Person 2	Relationship to Person 3
Relationship to Person 4	Relationship to Person 5	Relationship to Person 6

Does this person live with Person 1? Yes No

If **No**, list address.

3. Date of birth (mm/dd/yyyy)

4. What was this person's sex assigned at birth? Male Female.
This is usually the sex that was originally listed on their birth certificate.

OPTIONAL: See instructions for Questions 5 through 9 under Person 1.

5. Which best describes this person's current gender identity? Select up to five options.

- Male Female Transgender man/trans man Transgender woman/trans woman
 Genderqueer/gender nonconforming/nonbinary/neither exclusively male nor female
 Gender Identity not listed Please specify _____ Don't know Choose not to answer

6. Which of these describes this person's current sexual orientation? Select up to five options.

- Straight or Heterosexual Lesbian or Gay Bisexual Queer, pansexual, or questioning
 Sexual Orientation is not listed Please specify _____ Don't know Choose not to answer

7. Is this person of Hispanic or Latino origin or descent?

- Yes, Hispanic or Latino No, Non-Hispanic or Latino Don't know Choose not to answer

8. Race

9. Ethnicity

10. Does this person have a social security number (SSN)? Yes No (optional if **not** applying)
We need a social security number (SSN) for every person applying for health coverage who has one.

For important SSN information and how to apply for SSN, please see instructions for Question 10 under Person 1.

If **Yes**, give us the number _____ - _____ - _____

If **No**, check one of the following reasons. Just applied Noncitizen exception Religious exception

Is the name on this application the same as the name on this person's social security card? Yes No

If **No**, what name is on this person's social security card? _____

First name, middle name, last name, and suffix

11. If this person gets an Advance Premium Tax Credit (APTC), does this person agree to file a federal tax return for the tax year that the credits are received? Yes No

See instructions for Question 11 under Person 1.

If **Yes**, please answer questions a–d. If **No**, skip to question d.

a. Is this person legally married? Yes No

If **No**, skip to question 11c.

If **Yes**, list name of spouse and date of birth. _____

b. Does this person plan to file a joint federal tax return with a spouse for the tax year for which this person is applying?

Yes No

c. Will this person claim any dependents on this person's federal income tax return for the year for which this person is applying? Yes No

This person will claim a personal exemption deduction on their federal income tax return for any individual listed on this application as a dependent who is enrolled in coverage through the Massachusetts Health Connector and whose premium for coverage is paid in whole or in part by advance payments. List the name(s) and date(s) of birth of dependents.

d. Will this person be claimed as a dependent on someone else's federal income tax return for the year for which this person is applying? Yes No

If this person is claimed by someone else as a dependent on their federal income tax return, this may affect this person's ability to receive a premium tax credit. Do not answer **Yes** to this question if this person is a child under the age of 21 being claimed by a noncustodial parent. If **Yes**, please list the name of the tax filer. _____

Tax filer date of birth _____ How is this person related to the tax filer? _____

Is the tax filer married, filing a joint return? Yes No

If **Yes**, list name of spouse and date of birth. _____

Who else does the tax filer claim as dependents? _____

e. Is this person filing taxes separately because they are a victim of domestic abuse or abandonment? Yes No

12. Is this person applying for health or dental coverage? Yes No

If **Yes**, answer all the questions below. If **No**, answer Questions 18 and 19, then go to **Income Information** on page 17.

13. Is this person a U.S. citizen or U.S. national? Yes No

If **Yes**, is this person a naturalized, derived, or acquired citizen (not born in the U.S.)? Yes No

Alien number _____ Naturalization or citizenship certificate number _____

14. If this person is a noncitizen, do they have an eligible immigration status? Yes No

See instructions for Question 14 under Person 1.

a. If **Yes**, does this person have an immigration document? Yes No

Status award date (mm/dd/yyyy) _____ (For battered persons, enter the date the petition was approved as properly filed.)

Immigration status _____ Immigration document type _____

Document ID number _____ Alien number _____

Passport or document expiration date (mm/dd/yyyy) _____ Country _____

b. Did this person use the same name on this application that they did to get their immigration status? Yes No

If **No**, what name did this person use? First, middle, last, and suffix _____

c. Did this person arrive in the U.S. after August 22, 1996? Yes No

d. Is this person an honorably discharged veteran or active-duty member of the U.S. military, or the spouse or child of an honorably discharged veteran or an active-duty member of the U.S. military? Yes No

e. **Optional** Is this person a victim of severe trafficking, a spouse, child, sibling, or parent of a trafficking victim, a battered spouse, or a child or the parent of battered spouse?

15. Does this person live with at least one child younger than age 19, and is this person the main person taking care of this child(ren)? Yes No

Name(s) and date(s) of birth of child(ren) _____

16. Is this person living in Massachusetts, and does this person either intend to reside here, even if they do not have a fixed address, or has this person entered Massachusetts with a job commitment or seeking employment? Yes No

If this person is visiting in Massachusetts for personal pleasure or for the purposes of receiving medical care in a setting other than a nursing facility, you must answer **No** to this question.

17. Does this person have an injury, illness, or disability (including a disabling mental health condition) that has lasted or is expected to last for at least 12 months? If legally blind, answer **Yes**. Yes No

18. Does this person need reasonable accommodation because of a disability or an injury? Yes No

If **Yes**, complete the rest of this application, including Supplement C: Accommodation.

19. Is this person pregnant? Yes No
If **Yes**, how many babies are they expecting? _____ What is the expected due date? _____

20. **Optional** Does this person have breast or cervical cancer? Yes No (Special coverage rules may apply.)

21. **Optional** Is this person HIV positive? Yes No (MassHealth has special coverage rules for people with HIV.)

22. Was this person ever in foster care? Yes No

a. If **Yes**, in what state was this person in foster care? _____

b. Was this person getting health care through a state Medicaid program? Yes No

INCOME INFORMATION (You may send proof of all household income with this application.)

23. Does this person have any income? Yes No
If this person doesn't have any income, skip to Question 37.

EMPLOYMENT | If this person needs more space, attach another sheet of paper.

24. **CURRENT JOB 1:** Employer name and address _____ Federal Tax ID# _____

25. a. Wages/tips (before taxes) \$ _____ Weekly Every 2 weeks Twice a month Monthly Quarterly
 Yearly (Subtract any pre-tax deductions, such as nontaxable health insurance premiums.)

b. Income effective date _____

26. Average number of hours worked each WEEK _____

27. Is this person seasonally employed? Yes No. If **Yes**, which months does this person work in a calendar year?

Jan. Feb. March April May June July August Sept. Oct. Nov. Dec.

28. **CURRENT JOB 2:** Employer name and address _____ Federal Tax ID# _____

29. a. Wages/tips (before taxes) \$ _____ Weekly Every 2 weeks Twice a month Monthly Quarterly
 Yearly (Subtract any pre-tax deductions, such as nontaxable health insurance premiums.)

b. Income effective date _____

30. Average number of hours worked each WEEK _____

31. Is this person seasonally employed? Yes No. If **Yes**, which months does this person work in a calendar year?

Jan. Feb. March April May June July August Sept. Oct. Nov. Dec.

32. **SELF-EMPLOYMENT:** Is this person self-employed? Yes No

a. If **Yes**, what type of work does this person do? _____

b. On average, how much net income (profits or losses after business expenses are paid) will this person get from this self-employment each month? \$ _____/month **profit** or \$ _____/month **loss**?

c. How many hours does this person work per week? _____

OTHER INCOME

33. Check all that apply, and give the amount and how often this person gets it. **NOTE: You do not need to tell us about child support, nontaxable veteran's payments, Supplemental Security Income (SSI), or most workers' compensation income.**

Social security benefits \$ _____ How often? _____

Unemployment \$ _____ How often? _____

Retirement or pension \$ _____ How often? _____ Source _____

Interest, dividends, and other investment income \$ _____ How often? _____

Taxable veteran's benefits \$ _____ How often? _____

Taxable military retirement pay \$ _____ How often? _____

Alimony received \$ _____ How often? _____

If this person is receiving alimony payments from a divorce, separation agreement, or court order that was finalized before January 1, 2019, enter the amount of those payments here. \$ _____

- Other taxable income \$ _____ How often? _____ Type _____
- Net rental or royalty income: \$ _____ /**profit** or \$ _____ /**loss** How often? _____
- Capital gains: On average, how much net income or loss will this person get from this capital gain each month? \$ _____ /**profit** or \$ _____ /**loss**
- Net farming or fishing income: \$ _____ /**profit** or \$ _____ /**loss** How many hours each week? _____
- Lottery and gambling winnings: \$ _____ Effective Date _____
 How often? One time only Weekly Every two weeks Twice a month Monthly Yearly
 Non-cash prizes are not counted as qualified lottery and gambling winnings. Do not include any losses in the amount.

ONE-TIME ONLY INCOME

34. Has or will this person receive income during this calendar year as a one-time only payment? Yes No
 An example might be a lump-sum pension payment.
 If **Yes**: Type: _____ Amount \$ _____ Month Received _____ Year received _____
35. Will this person receive income during the next calendar year as a one-time only payment? Yes No
 If **Yes**: Type: _____ Amount \$ _____ Month Received _____ Year received _____

DEDUCTIONS

36. What deductions does do they report on their income tax return?
- See instructions for Question 36 under Person 1.
 - Educator expenses: Yearly amount \$ _____
 - Certain business expenses of reservists, performing artists, or fee-based government officials: Yearly amount \$ _____
 - Health Savings Account deduction: Yearly amount \$ _____
 - Moving expenses for members of the Armed Forces: Yearly amount \$ _____
 - Deductible part of self-employment tax: Yearly amount \$ _____
 - Contribution to self-employed SEP, SIMPLE, and qualified plans: Yearly amount \$ _____
 - Self-employed health insurance deduction: Yearly amount \$ _____
 - Penalty on early withdrawal of savings: Yearly amount \$ _____
 - Alimony paid from a divorce, separation agreement, or court order that was finalized before January 1, 2019:
 Yearly amount \$ _____
 - Individual Retirement Account (IRA) deduction: Yearly amount \$ _____
 - Student loan interest deduction (interest only, not total payment): Yearly amount \$ _____
 - None

YEARLY INCOME

37. What is this person's total expected income for the current calendar year?

38. What is this person's total expected income for next calendar year, if different?

THANKS! This is all we need to know about this person. For additional copies of this form, the ACA-3-AP, go to www.mass.gov/lists/applications-to-become-a-masshealth-member. Click on Massachusetts Application for Health and Dental Coverage and Help Paying Costs—Additional Persons.

Send your complete application to **Health Insurance Processing Center**
PO Box 4405
Taunton, MA 02780

or Fax to (857) 323-8300