

MAXIMUS Webinar Series

**Meeting the 1095-B
Tax Form Requirement:
Best Practices for
Medicaid and CHIP Programs**

September 21, 2015



Introductions



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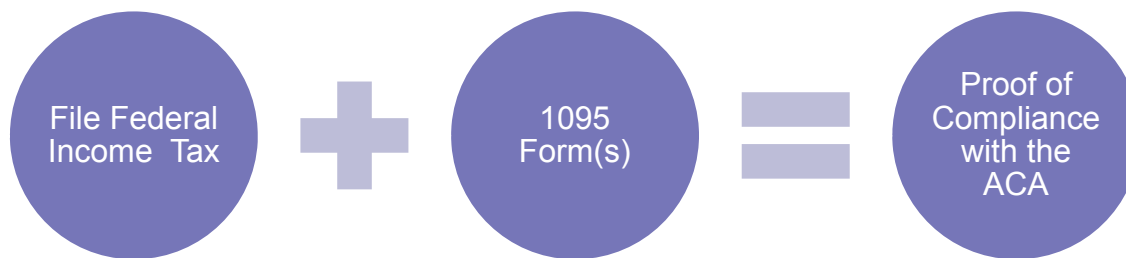
Vice President, Health Services
MAXIMUS

Purpose of Today's Webinar

- Review the Requirements for Tax Forms to Prove Individual Mandate Compliance
- Lessons Learned from 1095-A Process
- Best Practices
- How MAXIMUS Can Help

Requirements

- The Affordable Care Act (ACA) requires individuals to have health insurance
 - Requirement can be waived under certain conditions
 - Otherwise, failure to comply means a financial penalty is assessed



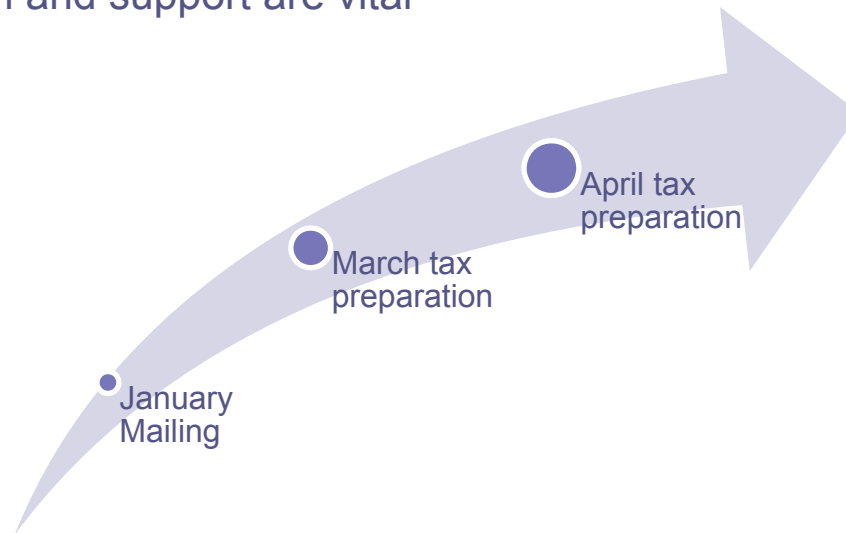
Health Insurance Tax Forms

1095	Who Gets Them	Who Sends Them
A—Health Insurance Marketplace Statement	People enrolled in qualified health plans (QHPs) thru the Marketplace—Federally-facilitated (FFM) or State-based (SBM)	<ul style="list-style-type: none"> • FFM for supported states • Agency running SBM
B—Health Coverage	People insured through: <ul style="list-style-type: none"> • Government-sponsored programs, including Medicaid and CHIP • Eligible employer sponsored plans (ESI) • Individual market plans • Miscellaneous Minimum Essential Coverage (MEC) 	<ul style="list-style-type: none"> • Medicaid/CHIP agency • MEC provider
C—Employer-Provided Health Insurance Offer and Coverage Insurance	Employees of applicable large employers	<ul style="list-style-type: none"> • Employer

- Health insurance is part of taxes
- The 1095 forms provide health insurance coverage in different ways
- Some families may get more than one 1095 form, based on household composition and life events
- Individuals and families will need help in understanding 1095 forms

What Have We Learned from 1095-A Experience

- MAXIMUS is involved with 6 SBM contact centers and played various roles in support of the 1095-A requirement in 2015
- On average, up to 25% of families receiving the forms contacted someone to help them understand the form and the actions to be taken
- Volumes of inquiries accelerate over time as tax deadline approaches
- Consumer outreach and support are vital



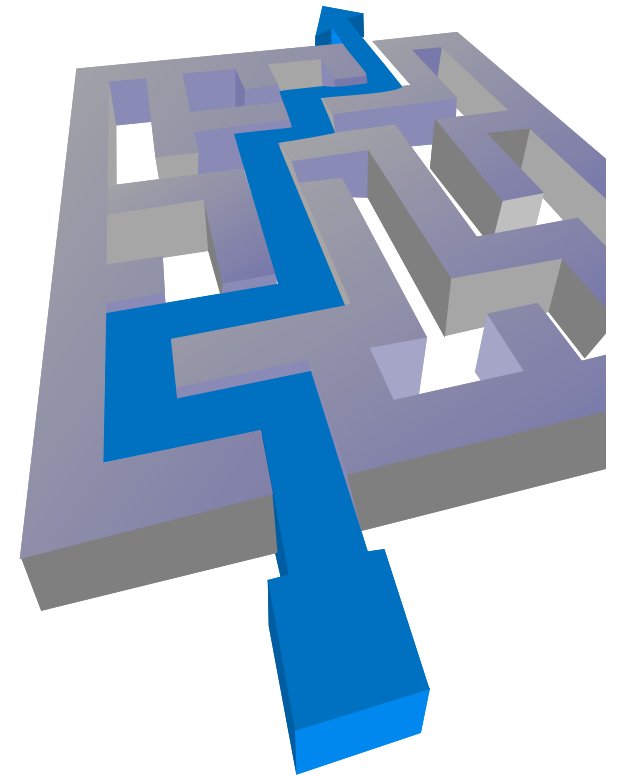
1095-A Best Practices

- Educating in-person assister community and issuers about tax forms
- Developing a resource page for consumers and other stakeholders to access information about 1095 forms
- Dedicated live support helpline with appropriate referral procedures and assistance with discrepancies
- Providing supplemental information to consumers with 1095 mailings
- Translation and readability assessments of 1095 resources
- Leveraging social media channels for outreach



How MAXIMUS Can Help – Contact Center Solutions

- **Provide “on-demand” Contact Center Services**
 - Deflect a majority of consumer inquiries away from the State
 - Reissue lost or replacement 1095-B forms to consumers
 - Answer FAQs
 - Utilize economies of scale to provide highly economical rates to state consumers
 - Deliver live services in English & Spanish and support for all other languages through Language Line



How MAXIMUS Can Help – Fulfillment Solutions

- **1095-B Fulfillment Services**

- **Form Creation**

- Generation and aggregation at the case level
 - Image repository extract and transmission
 - PHI | PII compliant solution
 - Operational readiness and testing beginning in November

- **Mailing Services**

- USPS address verification services
 - 1st class USPS mailing

- **Returned mail processing**

- Secure file transfer of undeliverable mail
 - Secure USPS undeliverable destruction



How MAXIMUS Can Help – Experience

- MAXIMUS touches one in two Medicaid consumers nationwide – we know this population:
 - Medicaid enrollment broker in 16 states
 - CHIP administrator in 7 states
 - 24 million calls handled annually
 - 350 million envelopes delivered annually
 - All services are on a per transaction basis – you pay for only what you use

Questions | Discussion



Thank You!

Want to discuss further?

Contact:
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To view the recording of this webinar and others, please visit:

www.maximus.com/webinars