

Locating an Electronic Copy of a Recipient's Mailed Form 1095-C

Effective 3/28/16

Procedure: 90-0-704

Purpose:

To define the procedures to locate a .pdf copy of a Form 1095-C issued to an employee or former employee of the State of Washington Controlled Group.

Overview:

- The PEB Division produces Forms 1095-C on an annual basis following each calendar year; and, produces corrected Forms 1095-C on a monthly basis as needed.
- PEB Outreach & Training (O&T) staff answer questions from employers about Forms 1095-C produced by the PEB Division for their employees and ex-employees.
- PEB Customer Service (PCS) staff answer questions from employees and ex-employees about Forms 1095-C produced by the PEB Division.
- PEB O&T and PCS staff can quickly access copies of mailed Forms 1095-C when answering questions from employers, employees and former employees.

Definitions:

Commodity Commission: One of 23 agricultural commodity commissions in Washington State engaged primarily in marketing or research related to a specific commodity (e.g., Apple Commission). A (commodity) commission is included in the definition of "state agency" in PEBB rules.

Employer: An employer identified as a member of the State of Washington Controlled Group.

Form 1095-C: A form the IRS requires employers of the State of Washington Controlled Group to file annually to reflect offers of coverage to full-time employees; and, to reflect the enrollment of employees and former employees (e.g. retirees) in Uniform Medical Plan.

Former Employee: An individual who has terminated employment with an employer, who may or may not have enrolled in PEBB coverage after termination (e.g., enrolled in retiree or PEBB continuation coverage).

PEBB Continuation Coverage: Temporary continuation of PEBB medical plan coverage, including COBRA, LWOP, and PEBB extension of coverage.

State of Washington Controlled Group: All state agencies, higher education institutions (including community and technical colleges), and commodity commissions in the state of Washington.

HCA IT Procedure:

1. HCA IT staff post .pdf copies of mailed Forms 1095-C to <X:\FilePickup\Form 1095-C PDF Prints> when employer files are received from Department of Enterprise Services.

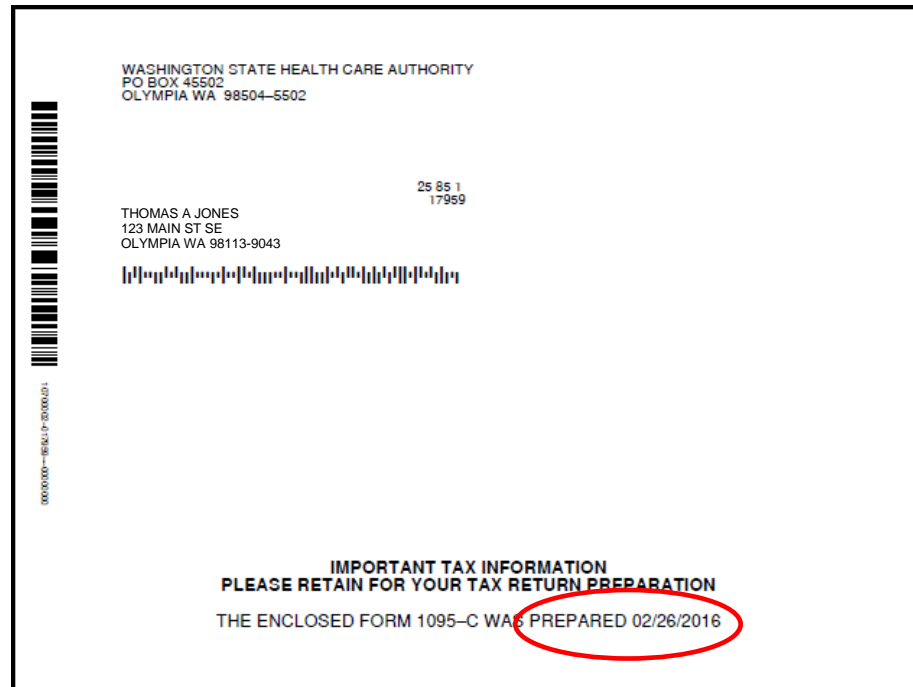
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- a. Files are organized by year, month, and day the Form 1095-C print files were processed, and named using the agency code and agency name. For example, the path for the file for the first Forms 1095-C for Health Care Authority employees and former employees is:
X:\FilePickup\Form 1095-C PDF Prints\Year 2015\2015 Report Printed 02-26-16\
107_WASHINGTON STATE HEALTH CARE AUTHORITY_1095Cs.

PEB O&T and PCS staff Procedure:

2. PEB O&T or PCS staff locate the recipient's Form 1095-C:
 - a. Copies (.pdf) of all mailed Forms 1095-C are located at the path
<X:\FilePickup\Form 1095-C PDF Prints>
 - b. Open (double-click) the desired reporting year folder (e.g., "Year 2015).
 - c. Open (double-click) the desired print date folder:
 - i. Ask the recipient for the "prepared date" of their Form 1095-C. Each Form 1095-C mailed to a recipient includes a "prepared date" on the return/delivery address page, which corresponds to the print date folder. For example, "PREPARED 02/26/2016" corresponds to the print date folder "2015 Report Printed 02-26-16".



- ii. If the recipient cannot provide the "prepared date" for their Form 1095-C, be sure to locate the most recent Form 1095-C for the desired report year by searching "newest to oldest" print date folders.

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- d. Open (double-click) the file with the agency number and name that matches the recipient's Form 1095-C. For example, the file for an employee or former employee of HCA is titled "107_WASHINGTON STATE HEALTH CARE AUTHORITY_1095Cs".
- e. Find the recipient's Form 1095-C:
 - i. Within this file, Forms 1095-C are organized alphabetically by **recipient first name**.
 - ii. Using the scroll bar on the right side of the document, manually scroll through the document to a record that is close to, and before, the first name on the form you are trying to locate.

For example, to locate an employee whose first name is "Thomas," manually scroll to a first name that begins with "T," but is not alphabetically after "Thomas." The name "Tanya" would work because it is before "Thomas." The name "Tony" would not work, because it is after "Thomas."
 - iii. Under the "Edit" menu, select the "Find" command (Ctrl+F), and enter a search criteria to locate the requestor's record. For example, a requestor's last name, or last four digits of his or her SSN would be effective search criteria. Click "Next" to begin the search.
 - iv. If the first record identified by your search is not the recipient's record, click "Next" again to search to the next record that includes your search criteria. Continue this process until the desired record is located.
 - v. When the recipient's record is located, make sure that Lines 1 and 2 of the Form 1095-C (name of employee and SSN) match the request.
- f. Each Form 1095-C includes either 4 or 5 total pages. Using the scroll bar on the right side of the document, manually scroll to the page the recipient is referencing:
 - i. Delivery/return address page;
 - ii. Important information about the Form 1095-C information sheet;
 - iii. Form 1095-C;
 - iv. Form 1095-C page 2 (Instructions for Recipient);
 - v. Form 1095-C page 3 (**included only if more than six covered individuals**).