



WHAT TO DISTRIBUTE & WHAT TO REPORT

DO YOU KNOW WHAT TO DISTRIBUTE...

...when an employee is eligible for the plan?

- Grandfathered Status
- Medicare Part D Creditable Coverage Notice
- Patient Protection
- Special Enrollment Rights
- Summary of Benefits and Coverage (SBC)
- Wellness Incentive Disclosure

...once the employee enrolls?

- CAA Notice of Preferred Care Provider
- Grandfathered Status
- HIPAA Notice of Privacy Practices
- Initial COBRA Notice
- Summary Plan Description
- Women's Health and Cancer Rights Act (WHCRA)

...annually?

- Children's Health Insurance Program
- Medicare Part D Creditable Coverage Notice
- Summary Annual Report
- Summary of Benefits and Coverage (SBC)
- Women's Health and Cancer Rights Act (WHCRA)

...upon certain events?

- Breach Notification
- COBRA Election Notice
- Exchange Notice
- Notice of Adverse Benefit Determination
- Notice of MCSO Receipt, Procedure, and Determination
- Notice of Modifications to SBC
- Notice of Recission of Coverage
- Summary of Materials Modifications to the SPD

DO YOU KNOW WHAT TO REPORT TO THE GOVERNMENT?

- Cost of Healthcare of Form W-2
- Disclosure of Rx Creditable Coverage (Medicare Part D)
- Form 1094/1095
- Form 5500
- PCORI Fee

DON'T FORGET ABOUT THESE!

- HIPAA Privacy & Security Policies
- HIPAA Risk Analysis
- Non-Discrimination Testing

Remember! Your company size and coverages will determine which of these you are required to provide. Check your Dashboard calendar for more info!

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