



WHAT TO DISTRIBUTE & WHAT TO REPORT

*The simplest compliance
checklist ever!*

DO YOU KNOW WHAT TO DISTRIBUTE...

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

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

...once the employee enrolls?

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

DO YOU KNOW WHAT TO REPORT TO THE GOVERNMENT?

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

...annually

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

...upon certain events

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

DON'T FORGET ABOUT THESE GUYS...

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

Don't forget! Your company size and coverages will determine which of these you are required to provide. Check your ComplianceDashboard calendar for more info!

Compliance
Dashboard®

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