



CONNECT *for* HEALTH
COLORADO®

Colorado Health Care Coverage Easy Enrollment Advisory Committee Meeting

Meeting #12

November 1st, 2021



Opening Remarks from the Easy Enrollment Advisory Committee Co-Chairs

Roll Call and Introductions; Approval of Prior Meeting Minutes

Co-Chairs:

- Monica VanBuskirk, Chief Policy and Relationships Officer, Connect for Health Colorado
- Amber Egbert, Legislative, Tax Business Rule, and Forms Coordinator, Taxation Division, Colorado Department of Revenue

Members:

- Colorado Department of Health Care Policy & Financing (HCPF) Representative: Marivel Klueckman, Eligibility Division Director
- Colorado Division of Insurance (DOI) Representative: Debra Judy, Deputy Commissioner of Policy Affairs
- Consumer Advocate Representative: Allison Neswood, Deputy Director of Strategic Priorities, Colorado Center on Law and Policy (CCLP)
- Small Business Representative: Zachary Pietrocarlo, Senior Tax Accountant, Olson, Reyes, & Sauerwein, LLC
- Insurer Representative: Jared Colturi, Operations Manager, Cigna
- Health Coverage Guide Representative: Tanya Trujillo-Martinez, Director of Community Health Development, North Colorado Health Alliance
- Insurance Producer Representative: Melanie Herrman, Seasons Insurance Agency
- Income Tax Preparer Representative: David Sullivan, Vice President, Stakeholder Relations, Intuit, Inc.
- Health Care Consumer Representative: Jeanine Draut, Owner, **CONNECT for HEALTH COLORADO** Communications

Guiding Principles

When asked what C4HCO and DOR need to do well to decrease the number of uninsured individuals and maximize enrollment in this program, you said:

- Process must be user-friendly. Including simple language and minimal administrative burden
- Outreach should be targeted to areas of the state with higher uninsured rates
 - Communications to individuals who are newly eligible should describe what benefits could look like
- Tax preparers must be educated on EE so that they can speak to the program
- Marginalized communities' fears around immigration must be addressed
- Prioritize health equity by addressing structural barriers faced by populations frequently excluded from the health care system



Resource for Coloradans with and without Documentation

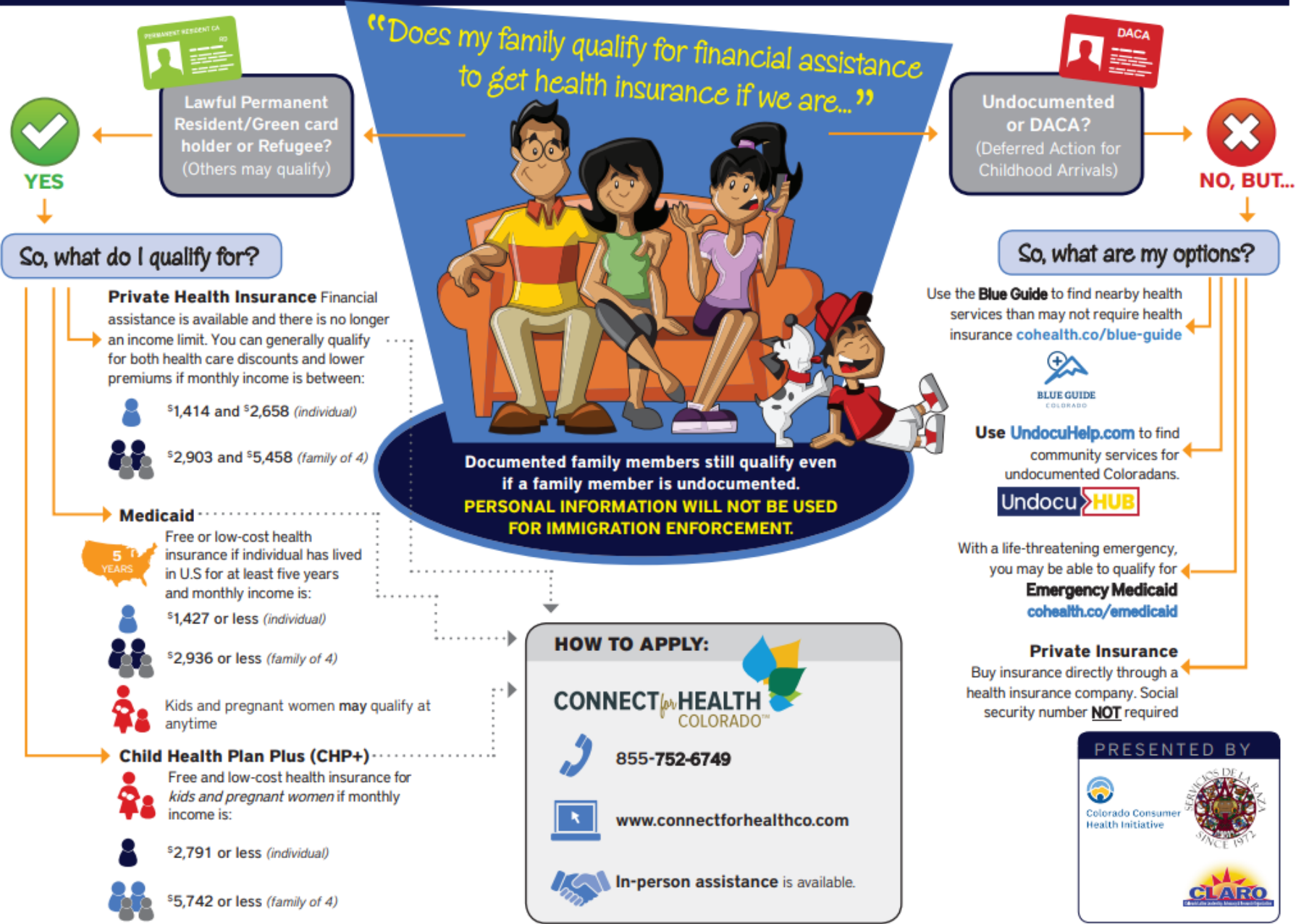
[ConnectforHealthCO.com](https://connectforhealthco.com)



Community/Stakeholder Feedback to the Committee

- We heard loud and clear the need to include resources for Coloradans without documentation on the Easy Enrollment website.
- Clear, concise, and easy to read.

Affordable Health Insurance for Immigrant Families



Immigrant Health Resource Infographic

A big THANK YOU to our partners at CCHI!

How this will be leveraged:

1. Will drop link to infographic in chat; Spanish version also included
2. Added to the Easy Enrollment website
3. Made available to Brokers, Assisters, and community organizations at CoverCO conference and via other avenues
4. Will need extensive updates once subsidized health coverage through Colorado Connect is available to Coloradans without documentation



E-filer Uptake

[ConnectforHealthCO.com](https://connectforhealthco.com)



E-filer Update

- So far 27 different software vendors have submitted a letter of intent to file individual income with Colorado
- These vendors develop 39 assorted products
 - A vendor may have a consumer product and a "professional" product, or may produce to support a specific industry or sector or niche of tax filing
- 14 of the 39 products will support the DR 0104EE schedule (the 14 products supporting the schedule make up a large/over half portion of the filings in the state)
 - We do not expect 100% adoption from vendors for a number of reasons.
 - Software vendors participate voluntarily in filing taxes in Colorado
 - Software vendors may produce a product that doesn't serve a demographic that would provide an ROI for certain items

Tax Help Colorado



Tax Help
Colorado

Partnering on Easy
Enrollment for Filing Season
2022



Mile High United Way

Tax Help Colorado Overview



Overview and History

Largest VITA program in the state of Colorado

Focus on taxpayers eligible for EITC and CTC

Launched in 2007 by The Piton Foundation

Adopted by Mile High United Way in June 2021



Community College Partnerships

Based on similar model in New Mexico

Students enroll in a credit-bearing accounting course in the fall and a practicum/lab in the spring

Creates a sustainable base for the program and helps us reach Coloradans from all communities and walks of life



Tangible Impact

91,000 families have filed their taxes for free

\$18.2 million in tax preparation fees saved

\$165 million in tax refunds

VITA at a Glance

- ◆ Has operated nationwide for more than 50 years
- ◆ Available to households earning less than approximately \$57,000 annually, people with disabilities, and people with limited English proficiency
- ◆ Rigorous volunteer training and certification requirements
- ◆ High degree of accuracy and customer service

EITC and Social Determinants of Health

- ◆ Earned Income Tax Credit (EITC) is the largest anti-poverty program in the United States
- ◆ EITC drives economic activity and is associated with improved outcomes in maternal and child health and education
- ◆ Only about 80% of eligible taxpayers claim the EITC

Tax Help Colorado Timeline

◆ September–November

- ◆ Students enrolled in ACC 132 begin their studies
- ◆ Partnership planning
- ◆ Volunteer recruitment
- ◆ **Curriculum and training materials developed and updated (tax law changes, etc.)**

◆ November–January

- ◆ **Volunteer orientation and training**
- ◆ **Taxpayer outreach and marketing**
- ◆ Site materials and logistics

◆ February–April

- ◆ Tax season! (implementation)

Opportunities for Partnership

- ◆ Volunteer training and materials
- ◆ Joint marketing and outreach
- ◆ Data collection/sharing
- ◆ Advocacy on behalf of low- and moderate-income taxpayers

Thank you!



Tax Help Colorado

Partnering on Easy
Enrollment for Filing
Season 2022



- Placeholder slide – an updated deck will be used on Monday

Implementation Update

Connect for Health Implementation Update

- Completed since last update
 - Development – ability to receive and store customer information from the DOR
 - Development – ability for customers to select the new Tax Time Special Enrollment Period (SEP)
- Currently underway
 - Testing – data transfer with the DOR
 - Development – matching logic to confirm customer eligibility for the Tax Time SEP
- Next steps
 - Testing – ability to match exchange applicants with information received from DOR
 - Development – ability to shop using Tax Time SEP
 - Development – Easy Enrollment notices

DOR Implementation Update

- The development and testing of the data collection and data transfer between DOR and C4HC is well underway
 - DOR has successfully sent test data through the system for C4 to receive/collect
 - DOR has the form functionality to collect data in our systems through functional testing and is in user acceptance testing now
 - DOR and C4 expect to complete testing the web service between agencies and confirm negative test scenarios by 10/29

Public Comment