



## Path to Pennie Attestation Verification Process: Stakeholder Talking Points

**Purpose:** The REV-1882 form is not supported by all tax software programs for 2022. Pennsylvanians who used tax software that did not provide form REV-1882 can still be eligible for the Tax Filer Special Enrollment Period to enroll in coverage.

**Target Audience:** Tax filers who used a tax software program that did not provide the REV-1882 form and are uninsured.

### **Background on Path to Pennie:**

- Path to Pennie was created to easily connect uninsured tax filers with medical & dental insurance offered through Pennie, as well as financial assistance to reduce the cost of health coverage and care. More information on Path to Pennie can be found at [Path to Pennie | Pennie](#)
- As uninsured tax filers complete their Pennsylvania state income tax return, they will have the option to elect via [Form REV-1882](#) to receive more information on enrolling in health coverage available through Pennie.

### **Key Points:**

- While many tax software vendors are supporting REV-1882 in 2022, REV-1882 is not currently available within certain tax software programs (two of largest that we know of are H&R Block and TurboTax).
- If a tax filer used a non-supportive tax software program, Pennie can still potentially help them get health coverage through the Tax Filer Special Enrollment Period.
- To qualify for this Special Enrollment Period, the customer **must** have submitted their Pennsylvania state income tax return via a tax software that did not support the form (such as H&R Block and TurboTax).
- Customers can call Pennie Customer Service at 1-844-844-8040 and explain that the REV-1882 tax form was not available through the tax



software they used to submit their Pennsylvania state income tax return

- Those customers who do not currently have coverage through Pennie and submitted their PA state income tax return through a tax software vendor that did not support form REV-1882, can attest to this information to Pennie in one of two ways:
  1. Verbally – the CSR will read the customer the [Tax Filer Special Enrollment Period Attestation Form](#) questions and the customer will agree verbally attest over the phone. Verbal attestation must be done by the customer themselves.
  2. Written – the tax filer must complete and sign the [Tax Filer Special Enrollment Period Attestation Form](#) which can be submitted directly by the customer or by an authorized representative, including a Pennie Broker or Pennie Assister, if they have one. The form itself must be signed by the customer. The Customer Service Representative (CSR) will check:
    - i. That the customer is not already enrolled in Pennie, and that at least one member of their household is uninsured, seeking coverage.
    - ii. That the customer did not already submit REV-1882, and is not in the process of receiving more information from Pennie.
- Once the customer has submitted their attestation the CSR must capture their information and create a ticket to share back with the Department of Revenue to verify the customer's attestations before the CSR can open the Tax Filer Special Enrollment Period for the customer
- The Department of Revenue will verify that the tax filer did in fact file their Pennsylvania state income tax return using a software that does support form REV-1882.
- Once the attestation has been submitted and verified by the Department of Revenue, the CSR can create an Exceptional Circumstance Special Enrollment Period for the customer. The customer will then have 60 days to enroll in Pennie coverage.