

Instructions to Consent to Electronic Delivery of Form 1095-C

The following provides important information about how you may elect to receive Form 1095-C electronically, and how to access the Form 1095-C in electronic format. Please review this information carefully. If you have any questions, please contact Peggy Freitas 512-863-1807.

ABOUT FORM 1095-C

Southwestern University is required to furnish certain employees with a Form 1095-C (sometimes referred to as the “Form”) to provide information about coverage under the Southwestern University Health and Life Insurance Plan for the preceding calendar year. This Form is generally provided by January 31 of the following year (unless the IRS extends the deadline for furnishing the Form to you, in which case the Form may be provided by such later date) and includes the following:

- Information about the health plan coverage offered to the employee and, if applicable, the employee’s family members.
- Information about enrollment of the employee and, if applicable, the employee’s family members in the health plan.

You may need the information provided on Form 1095-C when you prepare your federal income tax return for the calendar year to which the Form 1095-C relates. You may also be required to print and attach Form 1095-C to a federal, state, or local income tax return you file for the calendar year to which the Form 1095-C relates. (Consult your tax advisor or the instructions to the applicable income tax return for additional information about the requirement to attach Form 1095-C to the return.)

MANNER OF RECEIVING FORM 1095-C

The University sends Form 1095-C to employees by mail in January of each year (unless an extended IRS deadline applies). However, you can choose to receive Form 1095-C electronically by following the instructions and making your election to receive the Form electronically.

If you do not elect to receive Form 1095-C electronically, you will continue to receive a paper copy of Form 1095-C by mail.

IMPORTANT DISCLOSURES

Please review the following important disclosures regarding electronic delivery of your Form 1095-C.

Paper copies of Form 1095-C. If you elect to receive your Form 1095-C electronically but later wish to obtain a paper copy, one paper copy will be provided to you at no charge. To obtain a paper copy, please contact Peggy Freitas at 1001 East University Avenue, Georgetown, Texas 78626 or by telephone at 512-863-1807 or via email at freitasp@southwestern.edu. Your request

to receive a paper copy of your Form 1095-C will not change your election to receive your Form 1095-C electronically. If you wish to withdraw your consent to receive your Form 1095-C electronically, you are required to follow the procedure described below under “Withdrawing Your Election.”

Scope and duration of your election to receive Form 1095-C electronically. Your election to receive your Form 1095-C electronically will apply until the earliest of the following occurs: (1) you withdraw your election in the manner described below under “Withdrawing Your Election;” (2) your employment terminates; (3) the University changes the technical requirements to access Form 1095-C electronically (but you will be given notice and a chance to renew your election); or (4) you are notified that the University no longer offers electronic delivery of Form 1095-C.

Keep your contact information up-to-date. You are responsible keeping your contact information on file with the University up-to-date. If you fail to keep your contact information up-to-date, important mailings or communications from the University (including any paper copy of Form 1095-C that you are entitled to receive) may be delayed or may never be received. To update your mailing address or other contact information, please contact Peggy Freitas 512-863-1807 or via email freitasp@southwestern.edu.

Access Period. Your electronic Form 1095-C will remain available online at least through October 15 of the year following the calendar year to which the Form relates. If your Form 1095-C has to be corrected, you will be notified within 30 days after the corrected version is available electronically.

INSTRUCTIONS FOR ELECTING TO RECEIVE FORM 1095-C ELECTRONICALLY

Your election to receive Form 1095-C electronically must be made in a manner that reasonably demonstrates your ability to access the Form 1095-C in the electronic format in which it will be provided. Electronic distribution of Form 1095-C will be provided by posting Form 1095-C to the University’s Self-Serve portal, which is available at <https://selfservice.southwestern.edu/Student/Student/TaxInformation/TaxInformation#Form1095C>, where you can log in and view or download a copy of your Form 1095-C in PDF format. Accordingly, your consent to electronic distribution of Form 1095-C must be provided by accessing the Self-Serve portal and acknowledging the consent form. You will need a computer, tablet, smartphone, or other device that can access the internet in order to receive your Form 1095-C electronically.

The specific instructions for making an election are as follows:

1. Using a web browser, access the following webpage:
<https://selfservice.southwestern.edu/Student/Student/TaxInformation/TaxInformation#Form1095C>
2. Log in to the Self-Serve portal using your user ID and password.
3. Once you have logged into the employee portal, click on the ‘1095-C Information’ tab across the top of the page.

4. A page with an option button will appear giving you the option to elect to receive Form 1095-C electronically. Read all the information and statements provided in connection with changing your printing election.
5. If, after reviewing the content, you wish to elect to receive your Form 1095-C electronically, click 'Receive my 1095-C only in electronic format'. By clicking this option, you are agreeing to access your Form 1095-C electronically, and you will not receive a paper copy of Form 1095-C, unless you request one.
6. When the form is complete, click the 'Save' button.
7. Once the consent has been submitted, you can print a copy of the screen for your records.
8. You may also request confirmation that your consent has been received by contacting Peggy Freitas.

WITHDRAWING YOUR ELECTION

If you elect to receive your Form 1095-C electronically, you may later withdraw your election by logging into the Self-Serve portal and selecting the option to "Withhold my consent." If you have questions about withdrawing your consent, you may contact Peggy Freitas at 1001 University Avenue, Georgetown, Texas 78626 or 512-863-1807 or via email at freitasp@southwestern.edu.

The University will confirm withdrawal of your election in writing (either electronically or on paper), and will specify the date on which your withdrawal takes effect. Withdrawal of your election does not apply to a Form 1095-C that was furnished to you electronically before the date on which the withdrawal takes effect.

If you withdraw your election to receive Form 1095-C electronically before the University has sent the current Form 1095-C electronically, the University will furnish a paper copy of your current Form 1095-C within 30 days after receiving the withdrawal of your election.

INSTRUCTIONS FOR ACCESSING FORM 1095-C ELECTRONICALLY

Your Form 1095-C will be available to access electronically through the University's employee portal no later than January 31 following the year to which the Form 1095-C relates, unless a later date is permitted by the IRS. You will be notified when your Form 1095-C has been posted to the website. Notification typically will be provided by an email that includes the following statement in the subject line: "IMPORTANT TAX RETURN DOCUMENT AVAILABLE." However, the University reserves the right to instead provide notice in person or by regular mail.

You may also access your Form 1095-C electronically as follows:

1. Using a web browser, access the following webpage:
<https://selfservice.southwestern.edu/Student/Student/TaxInformation/TaxInformation#Form1095C>
2. Login to the Self-Serve portal using your user ID and password.
3. Once you have logged in, click on the '1095-C Information' tab across the top of the page.
4. If your Form 1095-C has not yet been processed, you will not see the option to View/Print.

5. If your Form 1095-C has been processed, you will see a 1095-C Statement button next to the applicable calendar year. Click on that button to open your Form 1095-C for that year.
6. Your Form 1095-C may open in a new tab or window within your web browser, or may open within the PDF reader program you are using, depending on your device and web browser settings.
7. Click on the second page of your Form 1095-C to view the filing instructions.
8. Your Form 1095-C may be printed or saved to another location or device for use at a future date. Your Form 1095-C may be accessed in this manner for the duration of time that it is available on the University's Self-Service portal.