



Summit Health Reduces 60% of Tax Document Printing and Distribution Costs using MHC Document Self-Service

Summit Health is a non-profit healthcare system located in south-central Pennsylvania comprised of two hospitals (Chambersburg and Waynesboro), physician practices, a cancer treatment center and a surgery center. Summit Health employs over 3,000 employees.

Challenge

- Summit Health sought a more effective way to handle the time-intensive and costly W-2 paper printing and distribution process undertaken every year. Summit Health printed and mailed 3,500 W-2s annually, plus reprints. In order to eliminate the amount of paper W-2s they were required to print each tax year, the solution needed to be compliant with all IRS requirements for electronic W-2 delivery.
- In 2015, they needed to find an Infor Lawson-integrated solution to meet new Affordable Care Act (ACA) requirements for 1095-C document distribution in effect for 2015 taxes.

Solution

- In October 2014, Summit Health implemented MHC Document Self-Service (DSS) for IRS-compliant online W-2 distribution to employees. The solution allowed Summit Health to leverage their existing employee portal through integration with Infor Lawson Employee Self-Service and Active Directory.
- MHC Document Self-Service tracks employees who have opted in for electronic delivery and supports document printing for employees who have not opted in, in compliance with IRS regulations.
- Summit Health loaded 5 years of W-2 history into MHC Document Self-Service to immediately eliminate the internal staff labor and administrative costs of reprints. Employees were empowered to access and manage their own W-2 documents.
- In November 2015, they added the new 1095-C module to comply with ACA electronic delivery/authorization requirements. The additional 1095-C tax form was quickly and easily incorporated into their year-end tax processing.

Implementation

- 45 day implementation timeline
- All implementation was performed via phone calls and web conferences – no onsite time required, keeping costs low.

Benefits

- Infor Lawson-integrated document self-service streamlined year-end tax document processing.
- MHC Document Self-Service eliminated the administrative costs of tax form reprints. Employees could handle their own reprints with the self-service solution.
- The MHC Software solution reduced employee tax document distribution costs (W-2 printing reduced by ~50% in the first year and ~60% by the second year).
- MHC Document Self-Service ensured compliance with IRS regulations with authorization processing, audit reports and templates for IRS-compliant messaging.



Summit Health Delivers IRS-Compliant Electronic W-2s and 1095-Cs Online with MHC Document Self-Service

Customer	Summit Health
Business Functions Impacted	Human Resources, Benefits and Payroll
Documents Impacted	W-2s and W-2cs, 1095-Cs and Corrected 1095-Cs
ERP	Infor Lawson
Challenge	<ul style="list-style-type: none"> • Sought a more effective way to handle time-intensive and costly W-2 distribution • Sought an Infor Lawson-integrated solution to meet ACA requirements for 1095-C document distribution
Solution	<ul style="list-style-type: none"> • MHC Document Express™ for tax document print output • MHC Document Self-Service™ integrated with Infor Lawson Employee Self-Service and Active Directory authentication
Implementation	<ul style="list-style-type: none"> • 45 day implementation timeline
Volumes	<ul style="list-style-type: none"> • Approximately 3,500 W-2s produced annually, plus reprints • Approximately 3,100 1095-Cs produced annually, plus reprints
Benefits	<ul style="list-style-type: none"> ✓ Streamlined year-end tax document processing ✓ MHC Document Self-Service reduced employee tax document distribution costs ✓ Solution eliminated administrative reprinting; employees can handle their own reprints ✓ Solution ensured compliance with IRS regulations; MHC provides templates for messaging to help organizations stay IRS compliant
ROI	<ul style="list-style-type: none"> ✓ W-2 printing and associated costs reduced by ~60% by the second year ✓ 1095-C printing and associated costs reduced by ~40% in the first year

“MHC has always been very responsive and easy to work with.”

—Margie Gyurisin
HR Systems Analyst