



# Assister Approaches to Helping Consumers During Tax Season



## Center for Consumer Information and Insurance Oversight

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# Agenda

- **Brainstorming Questions**
- **Best Practice Examples**
- **Resources**
- **Definition of Assister (Navigators and CACs)**





















# Best Practice: Obtaining Tax Preparation Grants and Training

## Goal

Cross-training assisters as tax preparers

## Action

Provide information sessions on the ACA and taxes for assister staff who are qualified tax preparers

## Achievement

Assisters serve dual roles as assisters and tax preparers to help consumers

Note: Assisters may not provide tax advice in their capacity as assisters. Where assisters are also tax professionals, they might be in a position to assist clients with the tax filing components of the APTC reconciliation process or claiming exemptions through a tax return, but should keep these duties separate and not perform any tax assistance within their capacity as assisters, or using federal assister grant or contract funds.

Assisters more knowledgeable about ACA –related tax provisions

# What Worked Well

- Inviting tax preparers to outreach events
- Inviting other community service providers to events to share information and services
- Attending tax events to educate and sign consumers up for Marketplace coverage
- Using HealthCare.gov and IRS.gov/ACA to convey accurate information to consumers on ACA and taxes
- Educating consumers on the documents they will need to apply for Marketplace coverage

# Thank you!

- A special thanks to assisters who took the time to share their experiences with us to include in this presentation.

# Resources for Assisters and Consumers – HealthCare.gov

- **How health coverage affects your 2018 federal income tax return:**  
<https://www.healthcare.gov/taxes/>
- **Exemptions Screener Tool:**  
<https://www.healthcare.gov/exemptions-tool/#/>
- **Tools to help you claim the affordability exemption and calculate your premium tax credit:** <https://www.healthcare.gov/taxes/tools/>
- **Fees & exemptions:**  
<https://www.healthcare.gov/fees-exemptions/>

# Resources for Assisters and Consumers – Marketplace.CMS.gov

- <https://marketplace.cms.gov/technical-assistance-resources/tax-information.html>
  - “My Tax Checklist” – What consumers will need to **file their taxes**: <https://marketplace.cms.gov/outreach-and-education/my-tax-checklist.pdf>
  - <https://www.irs.gov/aca>
  - <https://irs.treasury.gov/freetaxprep/>