

This job aid provides guidance for Health Plan Administrators (HPAs), who work with Health Coverage Tax Credit (HCTC) Finance & Accounting (F&A) representatives, when making administrative and banking changes.

It is the HPA's responsibility to keep this information current with the HCTC Program at all times. Keeping current will help the HCTC Program minimize delays when issuing payments, reduce the number of payments sent to incorrect remit to addresses and/or banks, and ensure all other communications are forwarded to the correct contact and/or address.

Updating Bank Information

When an HPA changes banks or updates existing banking information, it must follow the steps below to ensure the HCTC Program has the most current information:

- Contact its HCTC F&A representative to notify the HCTC Program of the changes.
- Send its HCTC F&A representative a completed **Administrative Changes Form** (see the Appendix of the HCTC Health Plan Administrator Operations Guide), *at least 30 days prior to the effective date of the changes*, by fax to:

Internal Revenue Service
HCTC Finance and Accounting Center
Attn: Your Finance & Accounting Representative
Fax: 1-800-675-9602

Updating HPA Administrative Information

The HPA must contact its HCTC F&A representative immediately if any of the following administrative changes occur:

- Payment Detail Report (PDR) recipient name and/or address
- HPA contact for the HCTC Program
- HPA contact's phone number
- HPA "remit to" address
- HPA name change

HPAs should contact their HCTC F&A representative as soon as they become aware of any impending changes. Making early contact will allow the HCTC Program to update all systems with the correct information and keep errors to a minimum.

For more information on HPA procedures, read the HCTC Health Plan Administrator Operations Guide at www.irs.gov (Keyword/Search: HCTC).