



WHAT TO EXPECT



**A SIMPLE
OVERVIEW OF W-9
CORRECTIONS
IMPLEMENTATION**

**IMPROVE YOUR PROCESS, LOWER YOUR COSTS,
AND AVOID PENALTIES WHEN FILING
MEDICAL PROVIDER 1099s WITH THE IRS**

Overview

W-9 Corrections is a comprehensive solution for helping healthcare payers easily and accurately file medical provider 1099s with the IRS. The W-9 Corrections solution allows TPAs, PPOs, Health Plans, and Workers Comp payers to increase efficiency, lower costs, and avoid penalties from the IRS for inaccurate or incomplete data. BASELoad is THE leader and innovator in this space, and our W-9 Corrections solution is unmatched in the marketplace.

COMPLETE & ACCURATE DATA

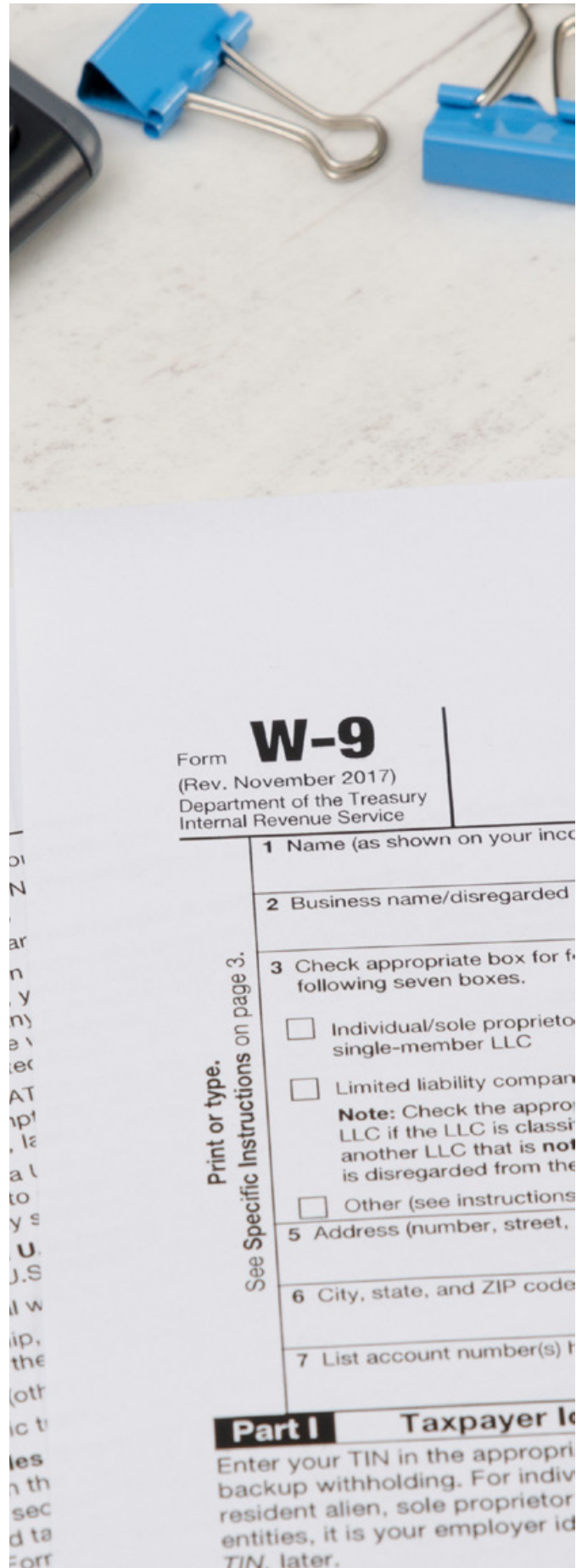
Our proactive process allows you to send the IRS accurate information and stay up to date on ever-changing IRS guidelines. Accuracy avoids fines and significantly reduces costs in labor and mailings.

REASONABLE CAUSE

Additionally, W-9 Corrections establishes procedures that are defined as reasonable cause by the IRS, thus allowing healthcare payers to request that the IRS waive any fines that are assessed due to TIN/Legal Name mismatches.

TRACK RECORD OF SUCCESS

No W-9 Corrections client has ever received a penalty from the IRS. We take great pride in being that useful to so many.



Discovery

QUALIFICATION

Do you send your 1099 Live file to the IRS not knowing the outcome? If your organization is like most healthcare payers, then you are experiencing significant pain and cost around 1099 filings due to incomplete and inaccurate medical provider data. W-9 Corrections alleviates these pains and radically reduces these costs.

- How many Unique Tax Ids did you create 1099s for last year?
- How many errors were on last year's CP2100 report?
- How many people currently work on the 1099 process?
- Do you handle W-9s and 1099 throughout the year or wait and do it all at once before the deadline?
- Do you have issues with invalid TIN/Legal Name combinations?
- Do you have issues with receiving incomplete and/or incorrect W-9s?
- Do you have issues with invalid addresses or returned mail?
- Do you Hold claims until you receive a W-9?
- Does this add an additional cost to processing claims? If so, how much?
- Have you ever paid a penalty to the IRS for 1099s?

OPTIONS

IN-HOUSE DESIGN & DEVELOPMENT

Healthcare payers all have staff that can write programs, manage databases, and do data research and entry. Therefore, a payer should ask the question: Is this something we want to do in-house? Usually, the answer is no. The costs, time, and unknowns are just too great.

Explore these questions to consider an in-house solution:

- How long (hours, weeks, months...) will it take to develop and code a solution?
- How many resources will be involved in this project?
- How many employees will need to be involved?
- How fast can the new solution (once designed and developed) be implemented?
- What projects/tasks will be moved to the bottom of the priority list?
- How well can you predict the overall cost?
- And finally, how much confidence do you have in the overall success of the project?

Usually, designing and developing a W-9 correction solution in-house is just not a good option, especially since the IRS can change procedures, rules, and regulations annually.

VENDOR HISTORY

Have you used a vendor before to help with the 1099 process? How did it go? If it wasn't a pleasant experience and you weren't more than satisfied with the outcome, then you will want to explore why and try not to repeat the same mistakes.

USING W-9 CORRECTIONS

W-9 Corrections services has been a complete 1099 outsourcing solution for many payers since 2010. Our processes are in place, our technologies are well developed, and our database of medical providers is enormous. With the W-9 Corrections solution we confirm the legal TIN/Legal Name combination before you file with the IRS. For any TIN/Legal Name combinations we might not have in our database, we reach out to the providers in question by sending them a W-9. Once received back at BASELoad, we data capture the W-9 information and validate that the TIN/Legal Name combination is correct. For W-9s that are not returned or remain invalid, BASELoad tracks every step taken supplying you with "reasonable cause" data as defined by the IRS. This will ensure any potential fines are waved. This service is maintained quarterly in order to be proactive and avoid the end of the year rush.

Implementation

PROJECT OVERVIEW

To get started, we will want to include all participating team members when discussing the goals and all issues surrounding your 1099 process. We can create a timeline of when the new solution will need to be implemented. And we can truly consider your budget, asking: What are you spending now versus the cost and benefit of implementing the solution? Once buy-in and understanding is fully in place, we'll move into implementation of the project.

IDENTIFY THE TEAM

- Who is the final decision maker?
- Who will export the 1099 file?
- What team will be used to work on the CP2100 error report for Tax ID / Legal Names that do not match the IRS database?
- What team will be used to handle all returned mail from W-9s, B-Notices, 2nd B-Notices, 1099s?
- What team will be used to fix these errors and resend new documents?

DEFINE THE OBJECTIVES

- What are your ideal goals of a 1099 solution?
- What are your 1099, W-9, CP2100 report issues specifically?
 - Duplicates?
 - Incorrect TIN/Legal Name combinations?
 - Undeliverable addresses?
- Reasonable cause data needed for waiving IRS fines?
- What claim/bill payer system are you currently using?
- How many 1099 records were sent to the IRS last year?
- Do you send your 1099 Live File to your printer without accuracy control?



Implementation

EXECUTION

DATA GATHERING

Once the goals, needs, budget, and timeline are clearly defined, BASELoad will establish a secure FTP for you to safely and easily send your 1099 file. If you are not able to produce a 1099 file in the fire.irs.gov format, then we are happy to handle this for you. We can reformat and/or merge files to gather to create a fire.irs.gov file for an additional charge.

DATA CLEANSING

In the cleaning of your data, we will

- Receive clients 1099 file
- Determine TIN/Legal Name combination errors
- Use our database to fix errors
- Send W-gs, B-notices, 2nd B-notices on the client's behalf for remaining errors
- Return to updated file to W-g Corrections for storage, data capture, and validation

DATA ENTRY

One of the best advantages of using our W-9 Corrections solution, is that you can stop the data entry of 1099 names. W-9 Corrections works with the actual file to be sent to the IRS, and we will correct that file before print and filing with the IRS. There is no need to data enter 1099 Legal Names anymore. We will supply you with an Excel spreadsheet containing all of the changes we made.

GOING LIVE

To take our changes live, you will need to

- Register W-9 Corrections as an "authorized agent" – W-9 Corrections will walk you through each step.
- Send W-9 Corrections 1099 files quarterly so we can proactively reach out to providers and ultimately grow our confirmed Tax ID / Legal Name database to serve your needs

PROJECT CLOSE

POST-IMPLEMENTATION VERIFICATION

The W-9 Correction solution processes quarterly mocks throughout the year and then processes the full file at the end of the year during live season in order to stay proactive. Once the file has been processed, BASELoad will provide the client with all the corrected TIN/Combinations, addresses that could be substituted for valid addresses, reasonable cause data for W-gs, B-Notices, and second B-Notices that weren't fixed. At the end of processing, clients send BASELoad their CP2100 reports (if there is one) for review, processing, correction or to supply reasonable cause data.

PROJECT ASSESSMENT

BASELoad's W-9 Corrections solution is a yearly service that is maintained quarterly and any client can subscribe for this service at any time during the year. Also, if you haven't already, this may be the best time to start thinking about other Medical Provider Data issues you may have. Many of our client's experience provider database and provider matching issues.

ADDITIONAL FEATURES

W-9 Corrections is a comprehensive solution that can be customized to your specific needs. In addition to accuracy and completeness in your data, you may need

- 1099 Printing - (printing, mailing, postage & handling)
- CP2100 for Previous Year
- Converting 1099 excel document into IRS 1099 format
- Creating non-standard reports
- Combining multiple files from multiple systems



W-9 CORRECTIONS IS A SOLUTION FROM BASELOAD, INC.

BASELoad has provided W-9 corrections and matching solutions for healthcare payers since 2010. Our W-9 Correction solution has processed millions of 1099 records for healthcare payers on multiple claim/bill platforms. We have never had a client using our solution receive a fine from the IRS.

The entire BASELoad team is US based and works from a single location in Rock Hill, SC. We are Soc2Typell certified and can be easily reached by phone or email during office hours.



EXPERIENCE

BASELoad is the inventor, the innovator, and the leader in custom solutions for medical provider database issues. We are service-focused, have a huge database for reference, and have processes developed and iterated for over 25 years. We never fail to radically reduce costs for our healthcare payer clients. Your operation will be more efficient and more profitable due to our services.



SECURITY

BASELoad is Soc2Typell certified with 20 years of experience in cleaning and managing medical provider data for the healthcare industry. Our business success is predicated on our ability to handle sensitive information and on our policies and procedures to keep client's information safe and secure.



SUPPORT

The entire BASELoad team is based in the United States and works from a single location in Rock Hill, SC. We do not have phone trees for customer processing, and we can be easily reached by phone or email during office hours. 24/7 technical support is also available.



COMPLEXITY

Not all healthcare payers operate or have the same provider database issues. BASELoad works with clients daily, to create custom solutions.

VALUE ADD



As well as cleaning up your medical provider data for W-9 Corrections, BASELoad offers additional services in improving adjudication (with our SureHit program).

Please call us to discuss how we can help you.

704-424-9889