

The Maxwell Health Data Extract

About the extract

The Maxwell Health ACA employer data extract provides you with most of the benefits information you will need to successfully fill out the Forms 1094 and 1095. These forms are required to be submitted to the IRS as part of ACA's employer shared responsibility provisions. This document provides a general overview of the Maxwell ACA data extract, as well as some information about its limitations, and a data dictionary.

Before you start, please be mindful that the data extract contains sensitive information and should be handled in a HIPAA-compliant manner.

The data extract contains three reports:

- 1) Employer information
- 2) Employee and dependent current demographic information
- 3) Employee and dependent medical product information

All three reports are on one tab, separated by a blank row.

FIRST REPORT: EMPLOYER INFORMATION

This report returns one row with basic employer information. See example:

Employer Name	Employer Tax ID	Employer Address Street	Employer Address Suite	Employer City	Employer State	Employer Zip Code
Dunder Mifflin Paper Company	12-13983434	100 Dunder Way	1	Scranton	Pennsylvania	18501

SECOND REPORT: EMPLOYEE AND DEPENDENT DEMOGRAPHIC INFORMATION

This report returns one row for each employee, and one row for each dependent the employee has in Maxwell. In the example below, Jim Halpert has added his spouse and three children to Maxwell.

First Name	Middle Name	Last Name	Name Suffix	Subscriber SSN	Member SSN	Type of User
Jim		Halpert		463939438	463939438	employee
Pam		Halpert		463939438	434334044	spouse
Ethan		Halpert		463939438	643434044	child
Jenny		Halpert		463939438	610142045	child
Marie		Halpert		463939438	640174044	child

THIRD REPORT: EMPLOYEE AND DEPENDENT MEDICAL PRODUCT INFORMATION

This report returns a row for each medical product enrolled or waived per employee and their dependents covered on the product in Maxwell. The only medical products shown have a start date and/or end date within the year 2019.

Please note:

- If an employee enrolled in one medical product and waived another medical product, two rows will display for that employee. In the example below, Jim Halpert enrolled in the Blue Cross Blue Shield PPO product, and waived the Blue Cross Blue Shield HMO product.

First Name	Last Name	Subscriber SSN	Member SSN	Type of User	Product Name	Product Action
Jim	Halpert	333333333	333333333	employee	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled
Jim	Halpert	333333333	333333333	employee	Blue Cross Blue Shield of Pennsylvania HMO 2016	Waived

- A “Waived” product indicates that Jim Halpert took action to waive the product.
 - As an example, if an employee has two medical products available to them in Maxwell, they can check out with one product without waiving the other product. Therefore, the report won’t always show a “Waived” product along with an “Enrolled” product.
- If an employee has a dependent who enrolled in or waived a medical product in 2019, there will be a row for each dependent. In the example below, Jim and his spouse Pam are both enrolled in Blue Cross Blue Shield of Pennsylvania PPO product.

First Name	Last Name	Subscriber SSN	Member SSN	Type of User	Product Name	Product Action	Product Coverage Level
Jim	Halpert	333333333	333333333	employee	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled	ee+sp
Pam	Halpert	333333333	444444444	spouse	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled	ee+sp

- If an employee experiences a life event that causes a change to their medical product, multiple rows will display for that employee. Multiple rows will display even if the individual did not switch to a new product as a result of the life event. In the example below, Jim Halpert experienced a life event and added his dependents to the product starting June 1, 2016.

First Name	Last Name	Subscriber SSN	Member SSN	Type of User	Product Name	Product Action	Product Coverage Level	Product Date Start	Product Date End
Jim	Halpert	333333333	333333333	employee	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled	ee+sp+chs	6/1/16	12/31/16
Jim	Halpert	333333333	333333333	employee	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled	ee	1/1/16	5/31/16
Pam	Halpert	333333333	444444444	spouse	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled	ee+sp+chs	6/1/16	12/31/16
Jenny	Halpert	333333333	555555555	child	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled	ee+sp+chs	6/1/16	12/31/16
Ethan	Halpert	333333333	666666666	child	Blue Cross Blue Shield of Pennsylvania PPO 1000 2016	Enrolled	ee+sp+chs	6/1/16	12/31/16

Data limitations

While the Maxwell data extract contains almost all the information you’ll need to complete the 1094 and 1095 IRS forms, there is some information we won’t be able to provide because we don’t collect it in Maxwell. This includes information pertaining to:

- Hours worked (time and attendance)
- COBRA
- Whether medical coverage was self-insured or fully-insured

- All medical coverage options available to an employee throughout the year. The report only includes information on the medical coverage that an employee enrolled in or waived, not information on all medical plan options they had available to them during open enrollment(s).

Additional limitations to the data provided in the extract include:

- Only current personal and demographic information is included. For example, if an employee changed their last name in July 2019, the data will only display their current last name, not their last name from January 2019 to July 2019.
- Only information entered into the Maxwell system will be included. For example, employers who went live on Maxwell in July 2019 will only have data from July 2019 to December 2019 displayed in the data extract, unless historical data was provided upon implementation. If historical data was provided upon implementation, it will be displayed in the data extract.

Data dictionary

The Maxwell Health ACA data extract fields are listed below, with explanations where necessary. The bolded fields are required, and therefore will always be populated in the report. Fields that are not bolded may display as blank in the report, as they are not required.

FIRST REPORT: EMPLOYER INFORMATION

- **Employer Name**
- Employer Tax ID Number
- Employer Address Street
- Employer Address Suite
- Employer City
- Employer State
- Employer Zip Code

SECOND REPORT: EMPLOYEE AND DEPENDENT DEMOGRAPHIC INFORMATION

- **First Name**
- Middle Name
- **Last Name**
- Name Suffix
- **Subscriber SSN** – The SSN of the employee
- **Member SSN** – The SSN of the individual listed. For an employee, “Member SSN” and

“Subscriber SSN” will display the same. This field is not required for dependents, but is for employees.

- **Type of User** – One of the following will display:
 - employee
 - spouse
 - domestic partner
 - child
- **Group** – The name of the employee’s eligibility group in Maxwell, as set up by the advisor and/or administrator based on subsets (i.e., divisions, classes, locations, etc.) For example, there may be a “Part Time” group and a “Full Time” group, or an “In-State” group and an “Out-of-State” group.
- **Address Street**
- Address Suite
- **City**
- **State**
- **Zip Code**
- **Email**
- **Gender**
- **DOB**
- Date of Hire
- Date of Termination—The date the employee was terminated (this could mean a voluntary or involuntary termination)
- Date of Rehire
- Annual Salary
- Employee Status—The employee’s current status in Maxwell (either “active” or “inactive”). Once an employee is terminated in Maxwell, their status is changed to “inactive.”
- Class—The employee’s employment class, as designated by their advisor or administrator. If this field is utilized, one of the following will display:
 - Union
 - Non-Union
 - Executive
 - Non-Executive

- Management
- Non-Management
- Hourly
- Salaried
- Administrative
- Non-Administrative
- Exempt
- Non-Exempt
- Highly Compensated
- Key-Employee
- Bargaining
- Non-Bargaining
- Owner
- President
- Vice President

THIRD REPORT: EMPLOYEE AND DEPENDENT MEDICAL PRODUCT INFORMATION

- **First Name**
- **Last Name**
- **Subscriber SSN**
- **Member SSN**
- **Type of User**
- **Product Name**
- **Product Action**—The action (either “Enrolled” or “Waived”) taken by the employee on the product
- **Product Coverage Level**—This will always display for “Enrolled” products, and will not display for “Waived” products. One of the following will display:
 - ee (just the employee)
 - ee+sp (the employee and their spouse)
 - ee+dp (the employee and their domestic partner)
 - ee+ch (the employee and their child)
 - ee+chs (the employee and their children)

- ee+sp+ch (the employee, their spouse, and their child)
- ee+dp+ch (the employee, their domestic partner, and their child)
- ee+sp+chs (the employee, their spouse, and their children)
- ee+dp+chs (the employee, their domestic partner, and their children)
- **Product Date Start**—The plan year start date for this product, as effective for this employee
- **Product Date End**—The last day of the plan year for this product, as effective for this employee
- **Product Employee Cost**—The amount the employee paid for the product on the frequency displayed in the “Product Cost Frequency” field. This will always display for “Enrolled” products. If an employee has dependents, the amount displayed in the employee’s row is the total amount for the employee and their dependents.
- **Product Employer Cost**—The amount that the employer paid for the product on the frequency displayed in the “Product Cost Frequency” field. This will always display for “Enrolled” products. If an employee has dependents, the amount displayed in the employee’s row is the total amount for the employee and their dependents.
- **Product Cost Frequency**—The frequency of the product cost indicated in the “Product Employee Cost” and “Product Employer Cost” fields

Questions?

If you have a question about the Maxwell Health ACA Data Extract, please have your Maxwell contact reach out to their Maxwell Health Account Manager.