

INFO SHEET

TAX DOCUMENTATION REQUIREMENTS

All businesses with 2-50 employees must supply their most recent **Quarterly Wage & Tax Statement (NYS-45)**. If not available, a copy of the most recent **Payroll Documents** (*including page that states Tax ID #*) and copies of the employees' **W-4** forms for recent employee hires, will suffice.

If the business is not required to file a Wage & Tax Statement (NYS- 45) HealthPass requires one of the the following:

If a "C" Corporation

Articles of Incorporation *and*
Schedule C or Schedule F (also known as form 1040, form 1120 respectively).

If a Church

Form 941

If a Partnership

Partnership Agreement *and*
Form 1065 and K-1 forms for each partner.

- Note: Only the partners of a Partnership may take a draw form the company and still be considered an eligible employee.

If an "S" Corporation

Articles of Incorporation *and*
Form 1120S *and* K-1 forms if filed

- Note: Only the shareholders may collect dividends as all or part of their wages. They must be actively at work (20-40 hrs) in order to be eligible for coverage.

If a Sole Proprietorship

(must have at least one other full-time employee)

Business License *and*

Schedule C (also known as form 1040, form 1099, respectively)

- Note: Only the owner of a Sole Proprietorship can take a draw from the company and still be considered an eligible employee.

If a Non-Profit (with \$25,000+ annual receipts)

Proof of Tax-Exempt status *or*

Any form of 501- C3 through 501-29

HealthPass reserves the right to request additional documentation at anytime.