

# 1095-B Tax Form User Research

March 14, 2022

# Project Overview

1095-B Tax Form | 03 14, 2022

Sending the 1095-B form via postal mail costs the VA approximately \$1.5 million, and an additional \$400,000 if they have to re-send it due to an error on the form. The filled out form isn't available online, and a Veteran has to contact the enrollment center to request a new one.

The Project is focused on making an area on VA.gov where users can easily be directed to or find their 1095-B form and download it.

We conducted two rounds of research over two sprints. The first round focused on medium fidelity wireframes and a short wayfinding activity on VA.gov. The second round focused on high fidelity designs with features that our team is able to ship for the first release.

5b0116

<b>Form 1095-B</b>		<b>Health Coverage</b>		<input type="checkbox"/> VOID	OMB No. 1545-2252
<small>Department of the Treasury Internal Revenue Service</small>		<small>▶ Do not attach to your tax return. Keep for your records. ▶ Go to <a href="http://www.irs.gov/Form1095B">www.irs.gov/Form1095B</a> for instructions and the latest information.</small>		<input type="checkbox"/> CORRECTED	<b>2021</b>
<b>Part I Responsible Individual</b>					
1 Name of responsible individual (First name, middle name, last name) <b>JOHN</b>		2 Social security number (SSN) or other TIN <b>123 - 55 - 6666</b>		3 Date of birth (if SSN or other TIN is not available) <b>11/22/19XX</b>	
4 Street address (including apartment no.) <b>1234 VETERAN DR.</b>		5 City or town <b>TOWNSVILLE</b>		6 State or province <b>CALIFORNIA</b>	
				7 Country and ZIP or foreign postal code <b>11111</b>	
				9 Reserved	
8 Enter letter identifying Origin of the Health Coverage (see instructions for codes): <span style="float: right;">▶ <input type="checkbox"/></span>					
<b>Part II Information About Certain Employer-Sponsored Coverage</b> (see instructions)					
10 Employer name <b>DEPARTMENT OF VETERAN</b>				11 Employer identification number (EIN) <b>22-XXXXXX</b>	
12 Street address (including room or suite no.) <b>9876 VETERAN DR.</b>		13 City or town <b>WASHINGTON</b>		14 State or province <b>DC</b>	
				15 Country and ZIP or foreign postal code <b>20001</b>	
<b>Part III Issuer or Other Coverage Provider</b> (see instructions)					
16 Name		17 Employer identification number (EIN)		18 Contact telephone number	
19 Street address (including room or suite no.)		20 City or town		21 State or province	
				22 Country and ZIP or foreign postal code	
<b>Part IV Covered Individuals</b> (Enter the information for each covered individual.)					
(a) Name of covered individual(s) First name, middle initial, last name		(b) SSN or other TIN	(c) DOB (if SSN or other TIN is not available)	(d) Covered (if 12 months)	(e) Months of coverage
					Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
23 <b>JOHN</b>		<b>DOE</b>	<b>1234-555-6666</b>	<b>11/22/19XX</b>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
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<small>For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.</small>					
				<small>Cat. No. 60704B</small>	<small>Form <b>1095-B</b> (2021)</small>

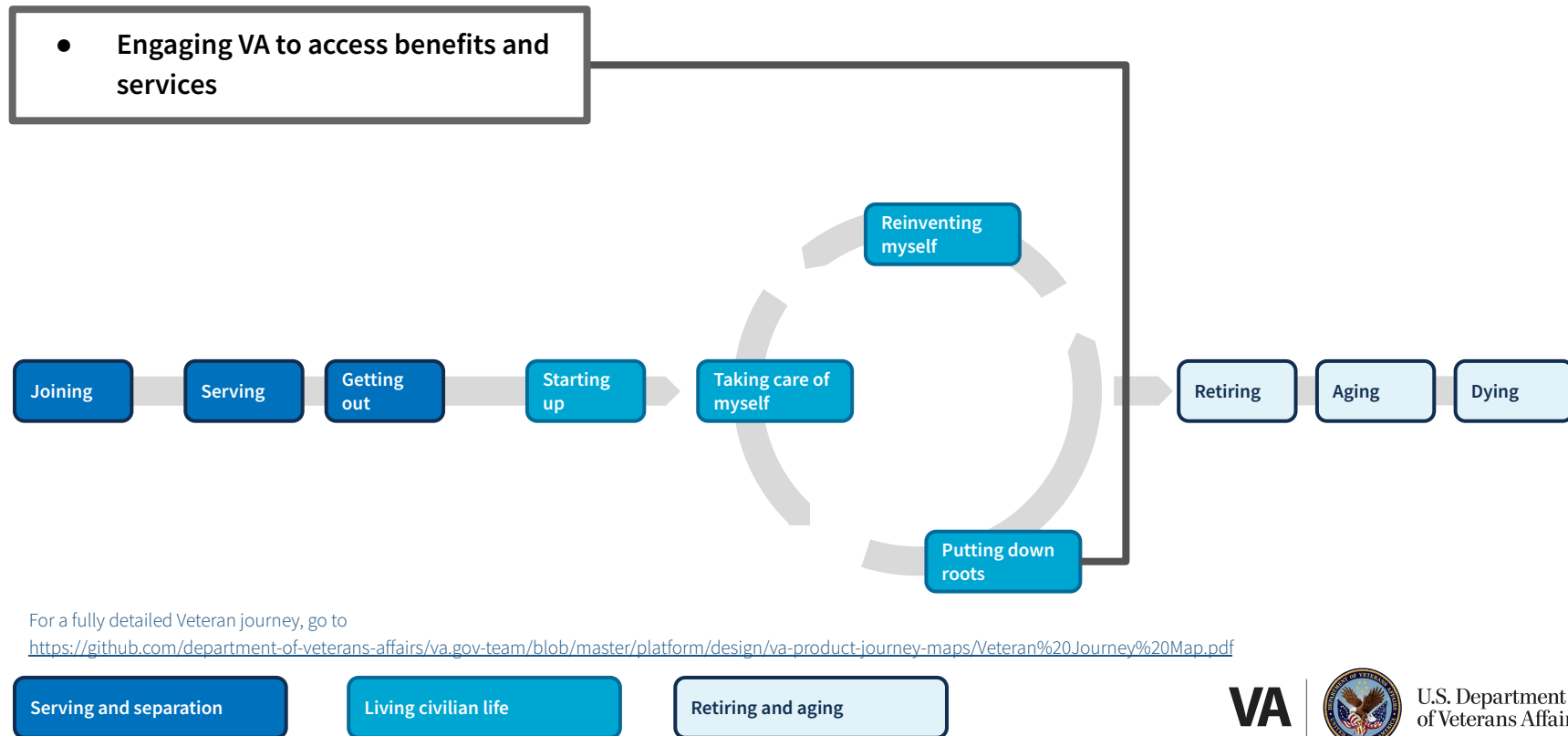
**VA**



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# How this research maps to the Veteran journey

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VA



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# OCTO-DE goals that this research supports

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Supported

Not supported

Veterans and their families can apply for all benefits online

Veterans and their families can find a single, authoritative source of information

Veterans and their families trust the security, accuracy, and relevancy of VA.gov

Veterans can manage their health services online

VFS teams can build and deploy high-quality products for Veterans on the Platform

Logged-in users have a personalized experience, with relevant and time-saving features

Logged-in users can update their personal information easily and instantly

Logged-in users can easily track applications, claims, or appeals online

Measures to increase

Completion rate of online transactions

Percent of applications submitted online (vs. paper)

Veteran satisfaction with VA.gov Benefit use and enrollment, across all business lines

Benefit value (in \$) delivered from online applications or transactions

Number of VA.gov users as a function of total Veteran population

Usage of digital, self-service tools

Measures to decrease

Time to successful complete and submit online transactions

Time to process online applications (vs. paper)

Call center volume, wait time, and time to resolution

Time from online benefit discovery to benefit delivery

VA



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# Participant Demographics

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Findings may not include the perspectives of the following underserved Veteran groups:

- Live in rural areas or abroad
- Veterans with an other than honorable discharge and those of immigrant origin
- Identify as Biracial, Asian, Native, or LGBTQ+

The prototypes were built in a desktop format, and did not test using mobile devices.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB					
1095-B Tax Form																																
final # of participants		14		# of AT users					0	# of no shows					0																	
Category	%	Target	Study	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24					
Veterans				Round 1										Round 2																		
Age 55-64+	50.00%	7	8	1	0	0	0	N	1	1	0	N	0	1	0	0	1	0	1	1	0	N	1	N	0	0						
Cognitive Disability	50.00%	7	3	1	0	0	0	0	0	0	0	N	0	0	0	1	1	0	0	0	N	0	0	0	0	0						
Mobile user	50.00%	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Rural	25.00%	4	0	0	0	0	N	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
No degree	25.00%	4	4	0	0	0	0	0	0	0	0	0	0	1	N	0	1	0	1	0	0	N	N	1	0	0						
Other than honorable	21.00%	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Immigrant origin	17.00%	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Women	10.00%	2	6	1	0	0	0	N	0	0	0	0	N	1	0	0	1	1	0	1	1	0	N	0	0	0						
Expat (living abroad)	0.40%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Race		Based on VA's projected statistics																														
Black	15.00%	3	4	1	0	0	0	N	0	0	0	0	0	1	N	0	1	0	0	0	1	N	0	0	N	0						
Hispanic	12.00%	2	2	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0						
Biracial	3.90%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Asian	3.00%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Native	0.30%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	N	0	0						
LGBTQ+		LGBTQ+ Veterans are 5 times as likely to have PTSD																														
Gay, lesbian, or bisexual	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Transgender	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						
Nonbinary, gender fluid, ge	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0						

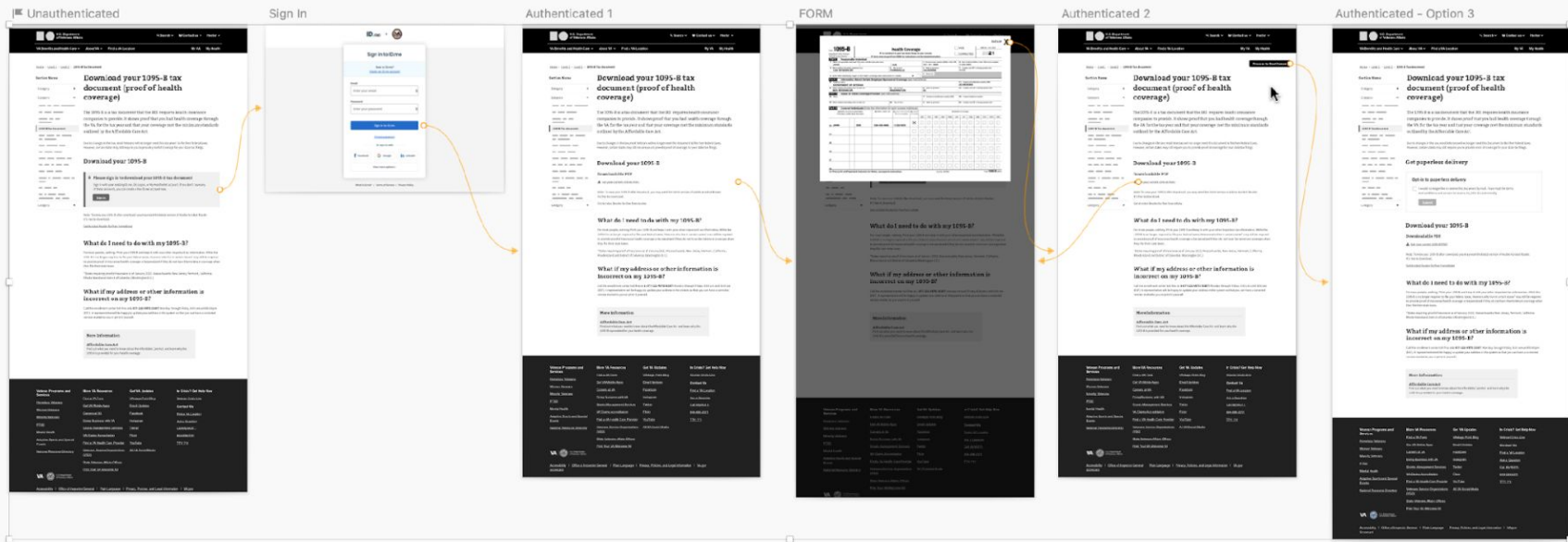
[Participant Tracker on Google Sheets](#)



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# First Round of Testing

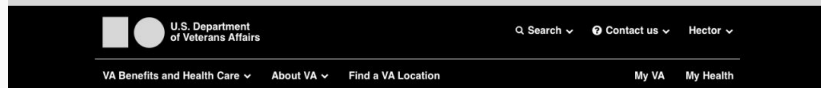
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# First Round of Testing

1095-B Tax Form | 03 14, 2022

## 1st Version: Download Only



Home > [Level 1](#) > [Level 2](#) > 1095-B Tax document

Proceed to Next Screen

### Section Name

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## Download your 1095-B tax document (proof of health coverage)

The 1095-B is a tax document that the IRS requires health insurance companies to provide. It shows proof that you had health coverage through the VA for the tax year and that your coverage met the minimum standards outlined by the Affordable Care Act.

Due to changes in the law, most Veterans will no longer need this document to file their federal taxes. However, certain states may still require you to provide proof of coverage for your state tax filings.

### Download your 1095-B

#### Downloadable PDF

[Get your current 1095-B \(PDF\)](#)

Note: To view your 1095-B after download, you may need the latest version of Adobe Acrobat Reader. It's free to download.

[Get Acrobat Reader for free from Adobe](#)

### What do I need to do with my 1095-B?

For most people, nothing. Print your 1095-B and keep it with your other important tax information. While the 1095-B is no longer required to file your federal taxes, Veterans who live in certain states\* may still be required to provide proof of insurance/health coverage or be penalized if they do not have the minimum coverage when they file their state taxes.

\*States requiring proof of insurance as of January 2022: Massachusetts, New Jersey, Vermont, California,

## 2nd Version: Paperless Opt In + Download



Home > [Level 1](#) > [Level 2](#) > 1095-B Tax document

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### Get paperless delivery

#### Opt-in to paperless delivery

☐ I would no longer like to receive this document by mail. I have read the terms and conditions and consent to receive my 1095-B electronically.

Submit

### Download your 1095-B

#### Downloadable PDF

[Get your current 1095-B \(PDF\)](#)


# First Round of Testing

1095-B Tax Form | 03 14, 2022

“This looks different. This is great (paperless). Less mail I get, the better. With mail, stuff gets missed or lost, so having e-delivery is great. I love to get that option...

I do all my bills if there's an option for paperless. I get an email and then go get it”

- Participant 2, Round 1



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My Health

[Home](#) > [Level 1](#) > [Level 2](#) > 1095-B Tax document

Section Name

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1095-B Tax document

Category +

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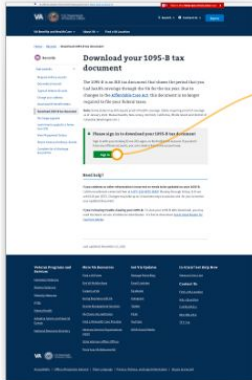
Downloadable PDF



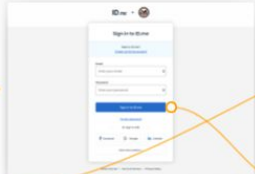
# Second Round of Testing

1095-B Tax Form | 03 14, 2022

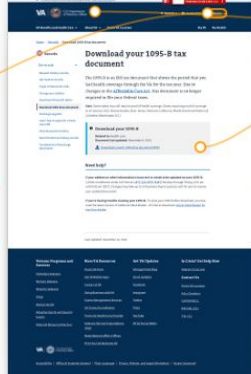
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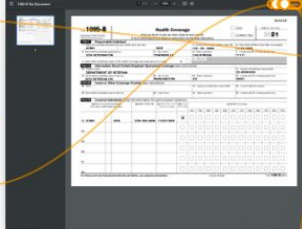
Sign In



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1095-B IRS form



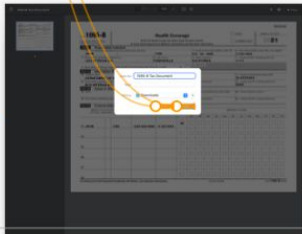
1095-B IRS form print



END



1095-B IRS form download



# Second Round of Testing

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VA

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Search

Contact Us

Reactor

VA Benefits and Health CareAbout VAFind a VA LocationMy VAMy Health

Home > Records > Download 1095-B tax document

Records

Get records

Request military records

Get medical records

Types of Veterans ID cards

Change your address

Download VA benefit letters

Download 1095-B tax document

Discharge upgrade

Learn how to apply for a home loan COE

View VA payment history

Search historical military records

Complete list of discharge documents

Download your 1095-B tax document

The 1095-B is an IRS tax document that shows the period that you had health coverage through the VA for the tax year. Due to changes in the [Affordable Care Act](#), this document is no longer required to file your federal taxes.

Note: Some states may still require proof of health coverage. States requiring proof of coverage as of January 2022: Massachusetts, New Jersey, Vermont, California, Rhode Island and District of Columbia (Washington D.C.)

Download your 1095-B

Related to: Health care

Document last updated: November 5, 2021

Download current 1095-B tax document (PDF)

Need help?

If your address or other information is incorrect or needs to be updated on your 1095-B, Call the enrollment center toll-free at 1-877-222-VETS (8387) Monday through Friday, 8:00 am until 8:00 pm (EST). Changes may take up to 10 business days to process and for you to receive your updated document.

If you're having trouble viewing your 1095-B: To view your 1095-B after download, you may need the latest version of Adobe Acrobat Reader. It's free to download. [Get Acrobat Reader for free from Adobe.](#)

Last updated: December 12, 2021

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Homeless Veterans

Women Veterans

Minority Veterans

PTSD

Mental Health

Adaptive Sports and Special Events

National Resource Directory

More VA Resources

Find a VA Form

Get VA Mobile Apps

Careers at VA

Doing Business with VA

Spouse Management Clinicians

VA Claims Accreditation

Find a VA Health Care Provider

Veterans Service Organizations (VSO)

State Veterans Affairs Offices

Print Your VA Welcome Kit

Get VA Updates

Veterans Point Blog

Email Updates

Facebook

Instagram

Twitter

YouTube

All VA Social Media

In Crisis? Get Help Now

Veterans Crisis Line

Contact Us

Find a VA Location

Ask a Question

Call 800-693-1111

844-696-2311

TTY: 211

VA

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Home > Records > Download 1095-B tax document

## Records

Get records

Request military records

Get medical records

Types of Veteran ID cards

Change your address

Download VA benefit letters

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**Related to:** Health care  
**Document last updated:** November 5, 2021

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# Key findings

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1. 8/8 Participants successfully completed the task  
(Sign in, View 1095-B Form, then Download or Print)
2. 7/8 Participants would prefer updating incorrect information on the website rather than calling the enrollment line
3. 6/7 \* Participants thought the 1095-B landing page made sense as part of the Records section of the VA website.  
\* due to the participant being late to the session, we didn't get to ask this question
4. 6/8 Participants would prefer receiving the 1095-B form on the VA website rather than getting a paper copy in the mail.  
1/8 would prefer both, 1/8 would prefer paper
5. All participants lived in states that don't require proof of health care to file State taxes



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# Research Theme: Do I Need This?

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During the initial interview, we spoke to participants about their understanding of the 1095-B tax form and how they used it when filing their taxes. **When asked “Do you know if the 1095-B form is required when you’re filing taxes?”** we saw the same theme of confusion over requirements that we saw in the first round of testing.

- 1 Participant thought it was a requirement to include the form when filing taxes
- 2 Participants were unsure if it was required, but reported including it with their taxes last year
- 3 Participants thought it was unneeded to include in tax filing, but kept it for their records
- 1 Participant reported shredding it because they didn’t need it
- 1 Participant wasn’t familiar with the form and didn’t recall ever receiving it in the mail

# Research Theme: Do I Need This?

1095-B Tax Form | 03 14, 2022

After completing the task with the prototype, and seeing copy regarding 1095-B requirements, one participant asked:

"It says due to changes to the Affordable Care Act, this document is no longer required to file your federal taxes. So why do they still send it out? Because it's no longer required."

– Participant 3, Round 2

Home > Records > Download 1095-B tax document

**Records**

- Get records
- Request military records
- Get medical records
- Types of Veteran ID cards
- Change your address
- Download VA benefit letters
- Download 1095-B tax document**
- Discharge upgrade
- Learn how to apply for a home loan COE
- View VA payment history
- Search historical military records
- Complete list of discharge documents

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**Download your 1095-B**

**Related to:** Health care  
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# Research Theme: Fixing The Form

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6/8 Participants found the Help section and said they would call the enrollment phone number to fix any mistakes on the form.

However, 3/8 Participants would first try selecting “Change Your Address” before calling the enrollment center.

The screenshot shows the VA Records website interface. At the top, there is a breadcrumb trail: Home > Records > Download 1095-B tax document. Below this, a sidebar menu lists various record types: Get records, Request military records, Get medical records, Types of Veteran ID cards, Change your address (highlighted with a yellow box), Download VA benefit letters, Download 1095-B tax document (highlighted with a grey box), Discharge upgrade, Learn how to apply for a home loan COE, View VA payment history, Search historical military records, and Complete list of discharge documents. The main content area is titled 'Download your 1095-B tax document'. It explains that the 1095-B is an IRS tax document showing health coverage through the VA. It mentions changes in the Affordable Care Act and states that the document is no longer required to file federal taxes. A note specifies that some states may still require proof of health coverage as of January 2022, listing Massachusetts, New Jersey, Vermont, California, Rhode Island, and District of Columbia. Below this, there is a section titled 'Download your 1095-B' with related information: 'Related to: Health care' and 'Document last updated: November 5, 2021'. A download link is provided: 'Download current 1095-B tax document (PDF)'. At the bottom, a 'Need help?' section provides contact information for the enrollment center: 'Call the enrollment center toll-free at 1-877-222-VETS (8387) Monday through Friday, 8:00 am until 8:00 pm (EST). Changes may take up to 10 business days to process and for you to receive your updated document.' A final note mentions that if users are having trouble viewing the 1095-B, they may need the latest version of Adobe Acrobat Reader, which is available for free from Adobe.

Home > Records > Download 1095-B tax document

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# Recommendations

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1. Design is strong and ready to launch
2. Add additional content on “Change Your Address” landing page, directing the user to call the enrollment center should they follow that path to update the form
3. Consider adding online form on authenticated 1095-B page to easily update address or other incorrect information, preventing the user from following other paths or making a phone call (Post MVP).

Larger Context:

4. Update policy on who receives 1095-B forms in the mail. Consider only sending it to those Veterans who live in States where it is required for filing State taxes.
5. Integration of enrollment system with other VA services to keep address information up to date.

## Bonus Tip

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Getting participants to share their screen as they walk through the prototype can be tricky, especially during shorter sessions.

Running the prototype from the host computer, and giving them remote mouse control often worked better. I also suggest having an intro screen where they practice moving their mouse and scrolling; they will be much more likely to scroll during the prototype if all the functions you're testing don't fit above the fold.



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# Prototype

Before we begin:

1. Please move your mouse around to make sure we can see it
2. Scroll the page until you see a purple square
3. Say “I’m Ready to Go” and wait.



# Thank You

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- Shane and Clayton for the guidance, feedback and helping me navigate getting started with conducting research
- Perigean team for the fast recruits, answering all my questions and getting the participants to the remote sessions
- Larger VA Design Community



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