

1095-B TAX DOCUMENT

Sprint 2 Demo

Tuesday, February 22nd, 2022

VA



U.S. Department
of Veterans Affairs

MOVE

Get to know the team

Core team

PRODUCT



Ashley Castillo
Washington DC
Product
Manager Lead



Jordan White
Dallas, TX
Product Manager



Tami Corson
North Carolina
Scrum Master

ENGINEERING



Nadya Primak
Washington DC
Engineer



Teagan Stephenson
Ft. Lauderdale, FL
Backend Engineer

Executive team



Jeff Scheire
MO Studio



Marcy Jacobs
McKinsey



Kevin London
Frog

DESIGN



Kit Casey
Boston, MA
Design Director



Carl Dickerson
Atlanta, GA
Content Strategist
and Plain Language
Content Creator



Grace Hong
New Jersey
Experience Designer



James Lewis
Austin, TX
Accessibility and UX
Research Lead



Will Reynolds
SERVE



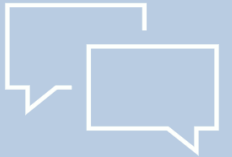
Ben Morris
Pluribus

At the end of each sprint on Tuesdays, the team will run sprint reviews to showcase the sprint's work for approval. The purpose of this meeting is:

- 1 To demo the accomplishments or functionality that was built over the past sprint



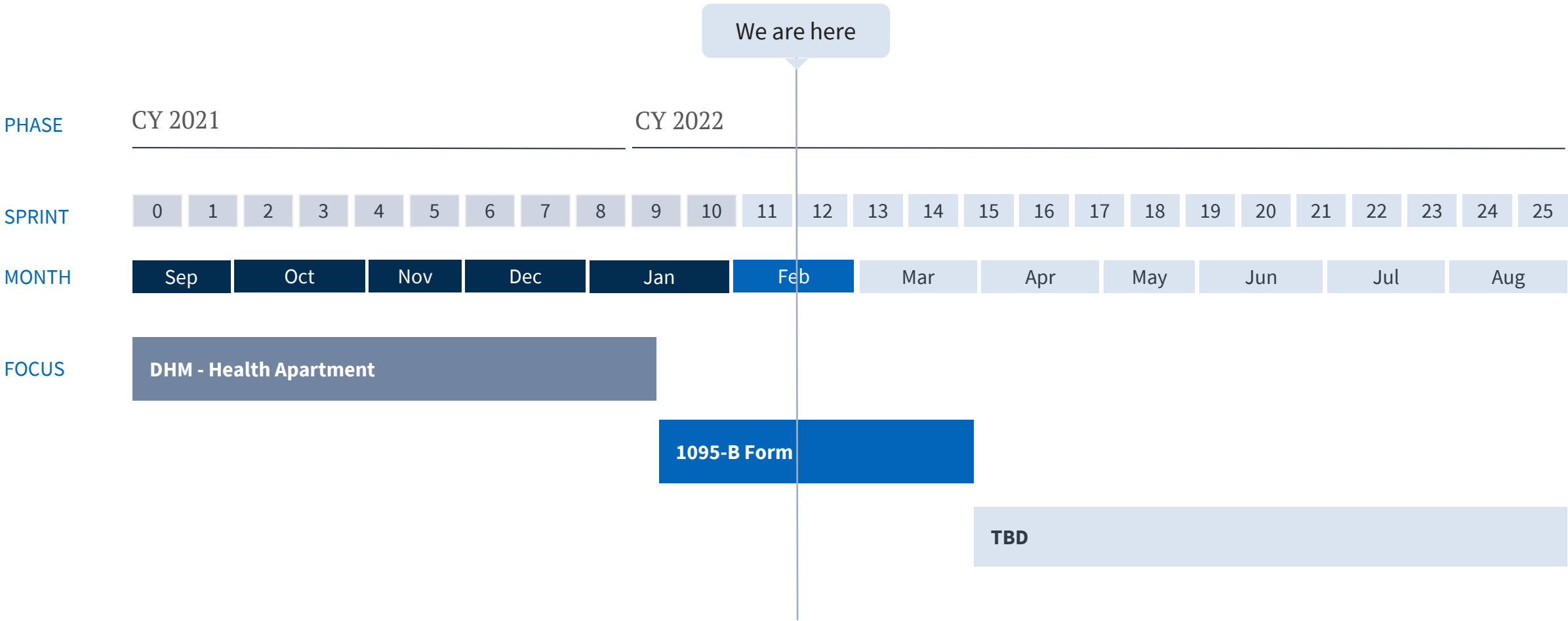
- 2 To get feedback and insights early and often



- 3 To create transparency for anyone interested on the product and progress



Roadmap overview



SPRINT 2 DEMO

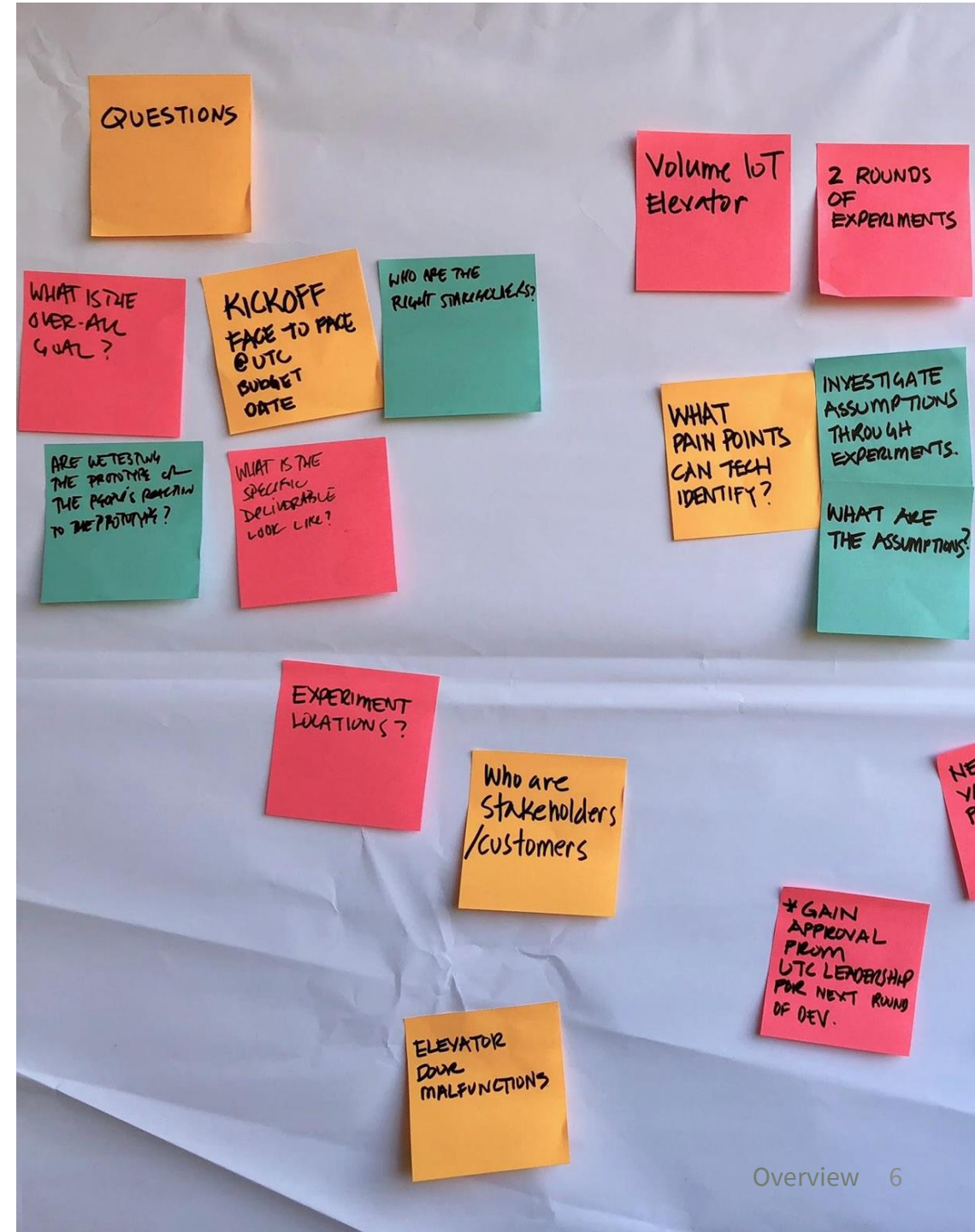
1095-B Overview

OVERVIEW

Project objectives

Digitize 1095-B form on VA.gov so Veterans can easily access the form and download the form for their records.

Goal: April 1st MVP launch



1095-B Project status & workplan

 Owned by design team

 Owned by product/engineering team

 Release



*Does not show post-MVP Validate phase meetings in Collaboration Cycle, such as Full Accessibility Audit and Post-Launch Check In

SPRINT 2 DEMO

Sprint 2

Agenda

Focus for today's demo

Sprint Goal: Sprint 2 is focused on user testing to validate our designs and to begin build for our product

1 DESIGN

- A. Conduct UX testing and synthesize findings
- B. Update designs to high fidelity and iterate designs based on feedback
- C. Draft cover letter and iterate on content
- D. Update conversation guide and research plan for second round of usability testing

2 TECH

- A. Start POC of generating a PDF using sample data and POC of front end
- B. Align with Technical POCs on approach and handoffs
- C. Set up Rails model and understand how to provision backend needs

3 PRODUCT

- A. Create sprint-by-sprint product roadmap for 1095-B
- B. Draft proposed process for how opt-in would work
- C. Begin to identify rollout plan needs

We welcome all feedback! Feedback will be collectively reviewed and prioritized appropriately based on where it stacks against other stories in the backlog as well as technical feasibility.

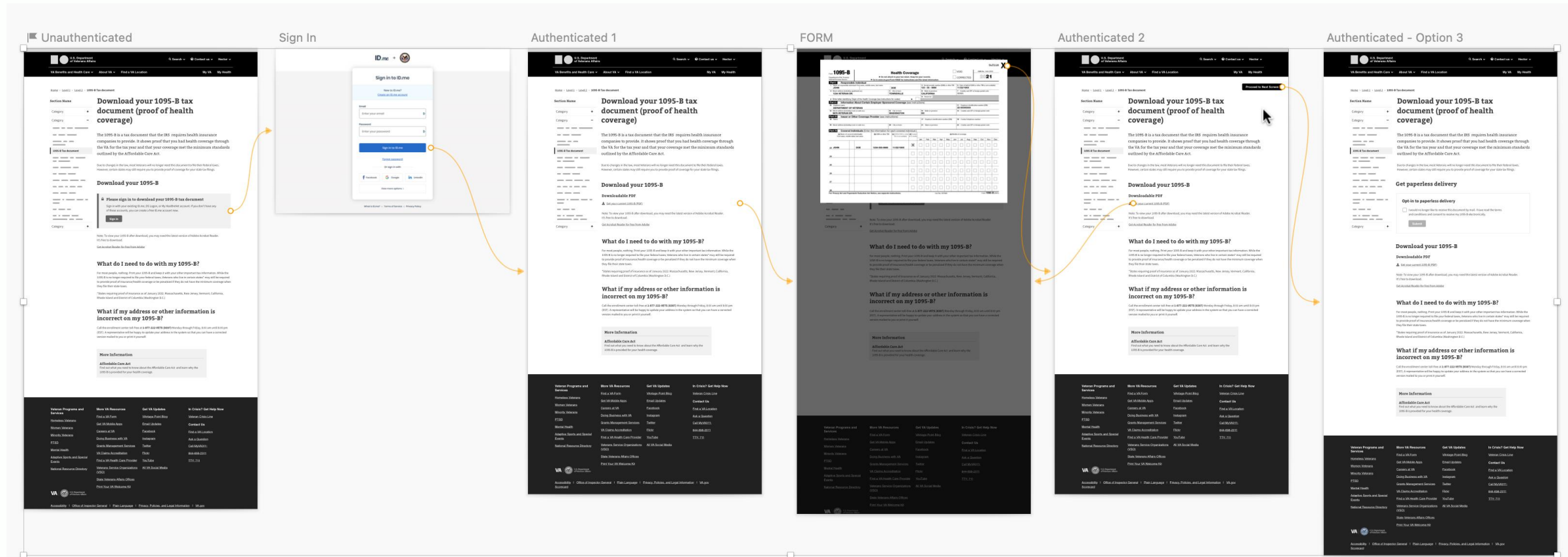
To validate our vision for the product, we spoke to 6 Veterans in this first round of testing

User Story: Conduct UX testing and synthesize

- 10 45-minute research sessions with Veterans scheduled
 - After no shows and cancellations, we completed **6 full sessions successfully meeting our minimum.**
 - A 7th session was conducted but shortened and modified to meet participant capabilities.
- 3 Parts of the session included:
 - 15 minute interview, 20 minute usability test with prototype of proposed solution, 10 minute VA.gov wayfinding activity
- Research Goals
 - Better understand how Veterans might find, use, and edit a digital copy of the 1095b form
 - Discover needs, pain points and preferences for physical or digital delivery of the form
 - Test usability of proposed solution

[Research notes](#) and [synthesis](#)

Round 1 Research Prototype



The prototype included medium fidelity screens with versions for: unauthenticated, authenticated and paperless opt in versions along with simulated sign-in page and 1095-B PDF

Overall Findings

- Design and content was well received, clear and easy to use
- The main flow from sign-in to download was well understood, participants found the download CTA quickly
- Method to fix errors with the 1095-B PDF was clear
 - Participants generally saw the FAQ question and associated telephone number regarding incorrect information, before they opened the actual 1095-B form. This was likely due to it being a usability test, and not indicative of real world behavior.
 - Keeping directions with how to fix information near the download CTA is likely important going forward

Research Theme: Recall & Recognition

- **5/6 participants recalled getting the 1095-B form** in the mail from the VA when explained in the context of it being “proof of health insurance” or “health coverage” form.
- Many explained that when they got in the mail, they filed it away for safe keeping until it was time for them to file their taxes or send their files to a tax preparer. Some made electronic copies of the paper form for easier access or the ability to use it on their computer during tax preparation.

“Every year with the healthcare law, I get the 1095 [*mentioned by name, unprompted*] that I provide to my accountant when he does all our taxes...

I just collect all that, then I create a pdf and then I drop an envelop of the hard copies off to the accountant. So that’s where everything gets tucked: the 1095s, W2s, 1099’s, all of it.”

- Participant 8

Research Theme: Digital vs Physical Delivery

- **4/6 participants preferred digital delivery.** The remaining 2 participants, who were both over 65 years old, were comfortable with digital but preferred paper due to a sense of security and ease
- Reasons cited for preferring digital were: ease of use / less hassle than paper, efficiency, ability to organize, and environmental benefits of saving paper

“I don't need the hardcopy mail and I prefer to do things electronically. It's just a lot quicker and efficient. And saves trees and hopefully taxpayer dollars.”

- Participant 3

“I do both [physical and digital] but I probably prefer the physical mail, because then it's reminding me of these things I might need... [and] I probably am not going to lose it.”

- Participant 7

Research Theme: Paperless Opt-In Delivery

- A second version of the authenticated download screen was shown with an option to sign up for paperless delivery.
Version shown was to test concept, not execution.
- Participants generally liked the ability to sign up for paperless delivery, with many of the same reasons cited as preferring digital download
- We didn't test larger, complex issues connected with paperless delivery: whether setting it at an individual page level vs profile/preferences level, how paperless delivery should be managed across all VA documents or in relation to email, SMS and other notification preferences.

“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

VA Benefits and Health Care

About VA

Find a VA Location

My VA

My Health

Home > Level 1 > Level 2 > 1095-B Tax document

Section Name

Category +

Category -

1095-B Tax document

Category +

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.

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 \(PDF\)](#)

16

Research Theme: Nobody wants to make a call

- The prototype was tested with the MVP solution – calling a 1-800 number to the enrollment center - for updating information on the 1095-B document if some of the information was wrong.
- **5/6 participants were negative towards calling a customer service phone number.**
- Expectation that there would be a long wait if they needed to call to update the form. **Digital is seen as an opportunity to avoid the hassle**, with an expectation they could update the form via messaging or online tool
- **2/6 participants said they wouldn't bother calling the customer service number** if their address was wrong on the document. Under real world conditions, outside of usability testing, this is likely to be more common behavior.

“I’m not going to get on the phone for an hour and talk to somebody just to change my address...

but if I was [going to fix it], I'd be more likely to do it if there was just like an online form... Because, if it takes more than a couple days and you want to file your tax return then [the VA will] have to be pretty fast I think.”

- Participant 3

“Because you're talking about a phone number for a government entity. And some people are gonna place that in the same category is calling Comcast because their internet's out... So maybe maybe an option also to, to email, if it's feasible.

- Participant 8

Research Theme: Do I need this?

- 4/6 Participants were unclear if they actually needed the 1095-B to submit with their taxes.
- Participant 3 attended law school and understood the legal requirements clearly.
- There seemed to be a general attitude that if the VA sends it to me its of some importance and it was connected to filing taxes.
- All participants reported keeping the 1095-B document with their other files, in preparation for filing their taxes themselves or sending it to a tax preparer.
- Only one participant lived in a state where it was needed to file with their State taxes. The remaining participants didn't need it to file.

“In Turbotax, there’s a checkbox that says do you need a 1095-B? I always say I got one. Guessing there’s probably some kind of penalty if I didn’t get one.”

- Participant 2

“This particular form [1095-B], I’m not sure I even need it.”

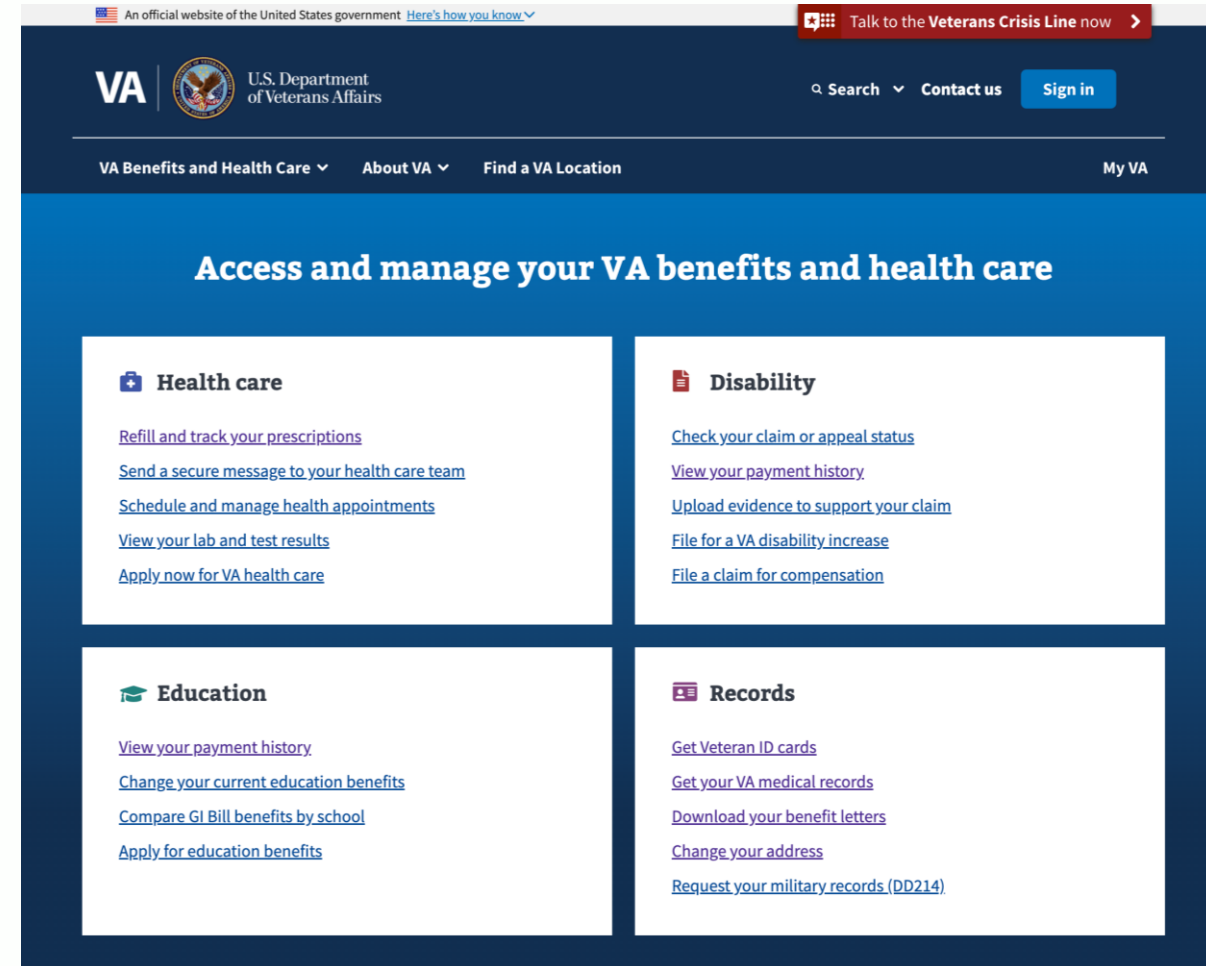
- Participant 6

“It seems like they probably send me something that says I’m covered for Obamacare, or or something.”

- Participant 7

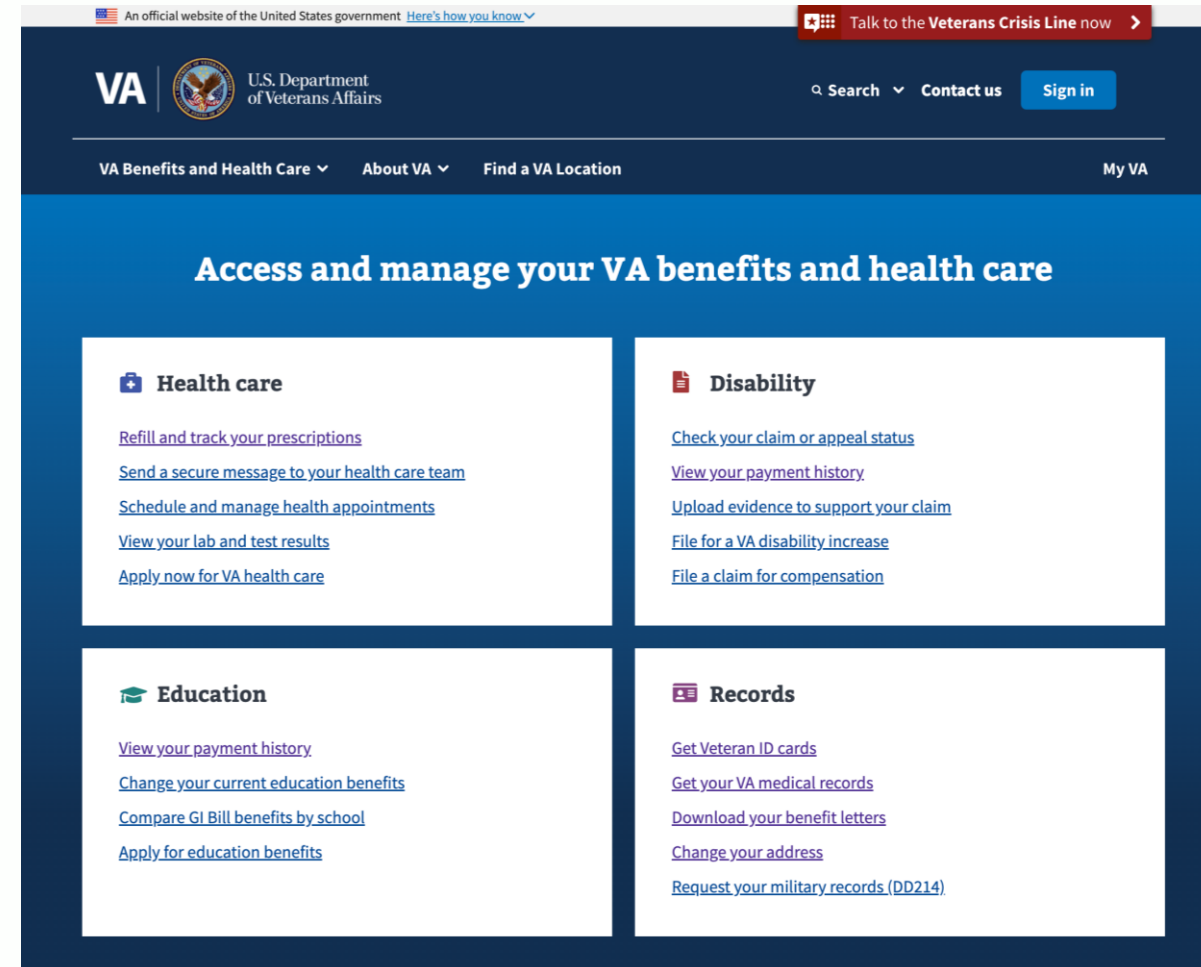
Research Finding: Finding the 1095-B Document 1/2

- Participants were prompted to visit the VA.gov website and asked where they might look for the 1095-B form.
- **4/6 Participants went to the Records panel first**, with the remaining 2/6 participants going to the Health care panel first.
- Asked for additional areas they might look for the document, 2 participants who initially selected Records said they might try Health care.



Research Finding: Finding the 1095-B Document 2/2

- Only one participant said they would try “search” unprompted, and only 2 went to the main navigation in the header unprompted.
- There was no clear link under Records where participants might expect to find the 1095-B without the title being changed
- It is likely that most traffic to the 1095-B landing page will result from emails directly linking the 1095-B page, as well as Google searches. A top level link on the homepage is not necessary nor recommended.
- Our team will discuss and review options with IA team going forward.



Recommendations & Next Steps

- The design for downloading the 1095-B is clear and well understood, with all participants easily completing the task of viewing the document. No major design changes needed.
- Reduced some written content to be more direct and less redundant; Clarified content on state requirements and included the affordable care act link in body copy.
- Improved visual hierarchy in high fidelity designs
- For next round of user testing with high fidelity designs, further explore preferences around updating the form (if information is incorrect) and how the participants understand the requirements of keeping the 1095-B document and including it their taxes.

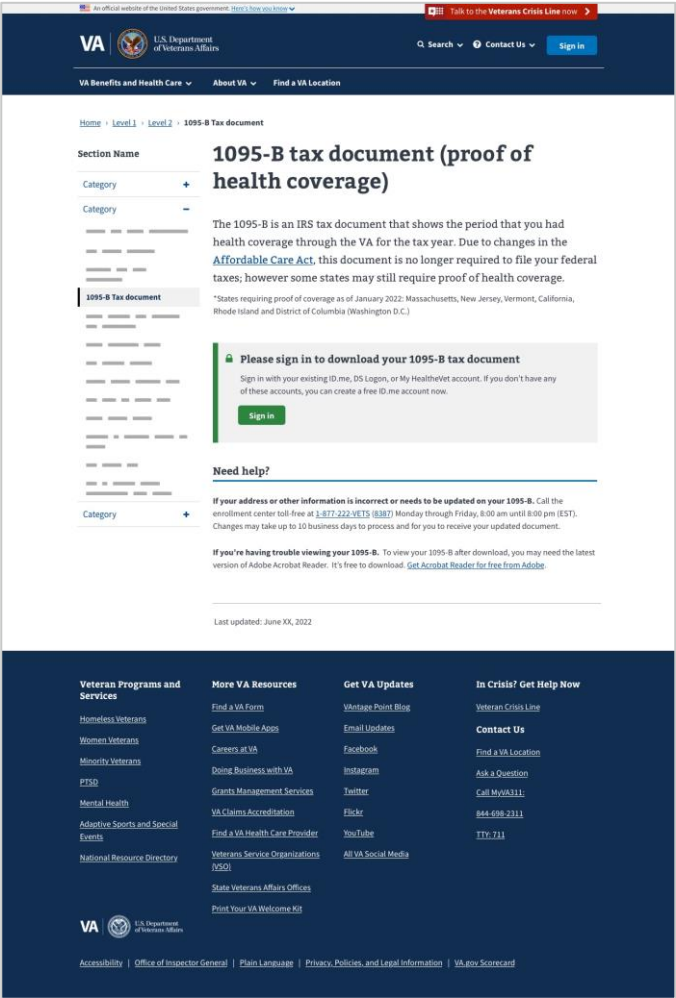
We updated our designs to high fidelity and incorporated feedback from Veterans and stakeholders

User Story: Update designs to high fidelity

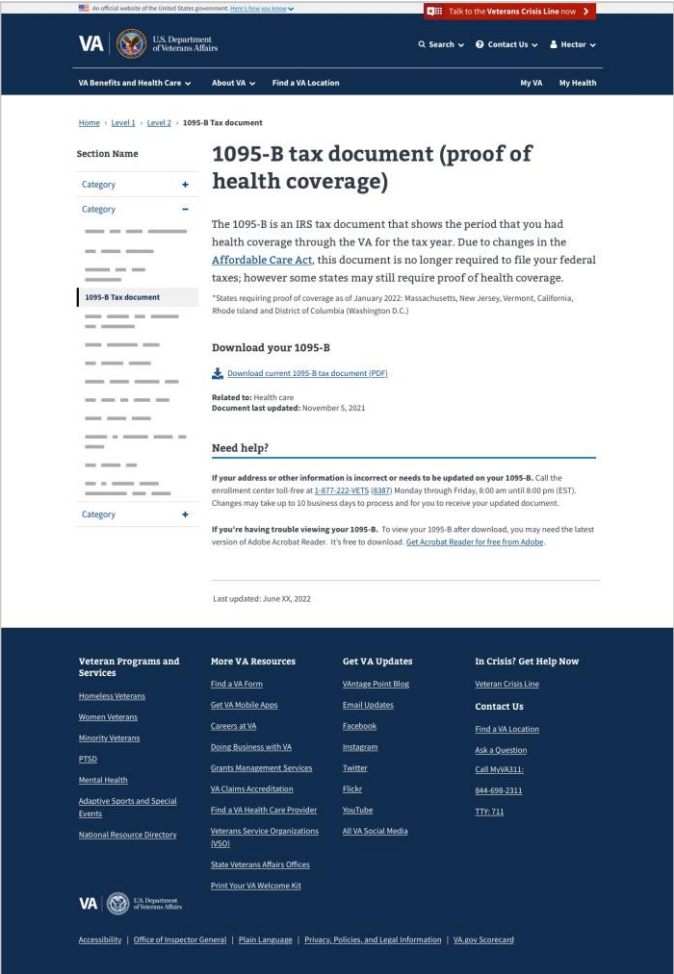
User Story: Iterate designs based on VA-PO feedback

See next page for detailed view

Unauthenticated



Authenticated



[Unauthenticated](#) and [authenticated](#) Link



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

Section Name

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1095-B tax document (proof of health coverage)

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; however 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

 [Download current 1095-B tax document \(PDF\)](#)

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

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: June XX, 2022

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We drafted the content the Veteran would see in the product

User Story: Draft cover letter and iterate on content

- Streamlined terminology, updating references of "form" to "document"
- Highlighted updates in law that impact what this form is needed for / what Veterans need to do with it
- Added callout for digital download, with link
- Updated "More Information" sub-header to be more actional and inclusive of help. Also, in body called out "enrollment center" to clarify which VA department



U.S. Department of Veterans Affairs
Veterans Health Administration

<Date Printed>

<VPID>
<First Name> <Middle Name or Middle Initial> <Last Name><, Suffix>
<Address 1>
<Address 2>
<Address 3>
<City> <State>, <Zip>

<FIRST NAME> <LAST NAME>,

Please keep this letter and the enclosed tax document for your <tax year> tax records.

The Affordable Care Act (ACA) requires the Department of Veterans Affairs (VA) to notify enrolled Veterans of their period of health care coverage during the previous calendar year. The law also requires VA to provide this notification to the Internal Revenue Service (IRS).

Enclosed you will find your IRS 1095-B, which documents your VA health care period of coverage during <tax year>. No additional steps need to be taken with this document. As of 2019, the ACA's individual mandate penalty no longer applies at the federal level, meaning that you will not be penalized for not having health coverage. However, keep this for your records as your local state may still require proof of coverage.

Download this Document Online
Get a digital copy of your 1095-B at <1095-B download URL>.

Get Help and More Information
Incorrect information on this document? Need help or have questions? Call us at the enrollment center toll-free at **1-877-222-VETS (8387)** Monday through Friday, 8:00 am until 8:00 pm (EST). You may also find additional information regarding the ACA on VA's website at www.va.gov/health-care/about-affordable-care-act/. For more information regarding the ACA's tax implications, visit www.irs.gov/Affordable-Care-Act/Individuals-and-Families.

Thank you for your service to our Nation.

Sincerely,

Director, Health Eligibility Center
VHA Member Services

702-800A
Nov 2021

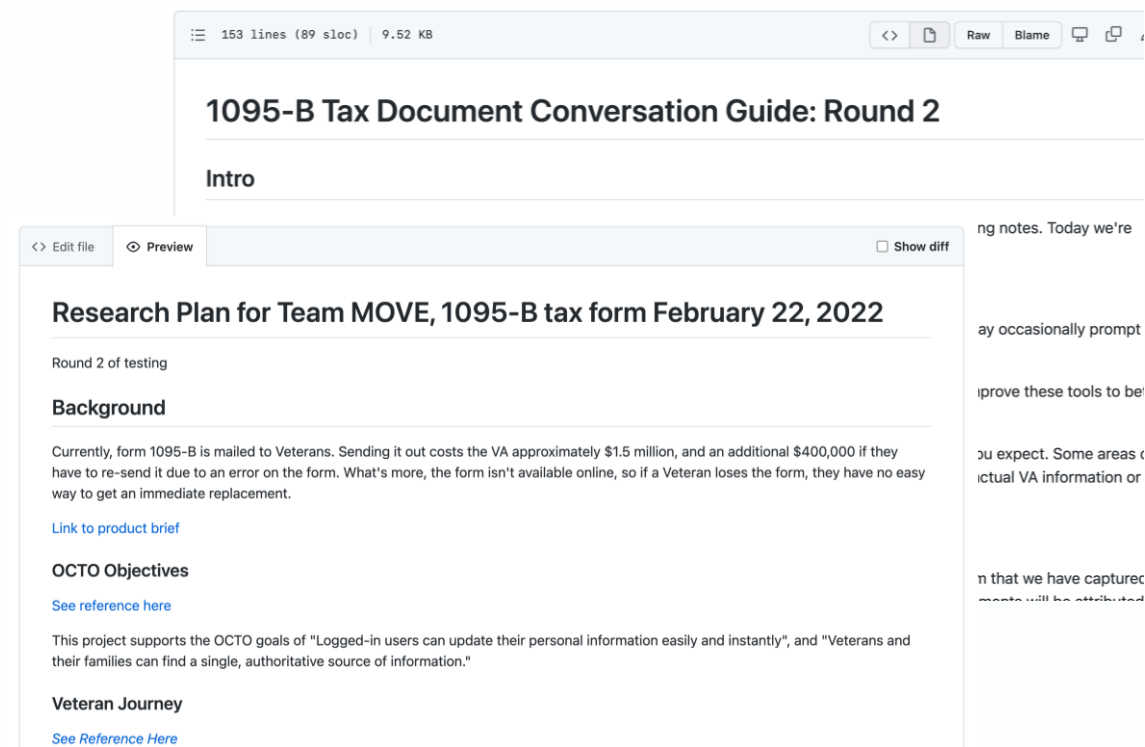
We planned for our second round of user testing to gather additional feedback

[User Story](#): Update research plan for second round of usability testing

[User Story](#): Update conversation guide for second round of usability testing

UPDATED RESEARCH OBJECTIVES

- Test usability of proposed solution with updated, high fidelity designs
- Continue to discover needs, pain points and preferences for physical and digital delivery of the form
- Clarify participants understanding of requirements for keeping and using the 1095-B



[Research Plan](#) and [Conversation Guide](#)

To start to bring the product to life, we built a proof of concept of how to generate a PDF and started our front end build

User Story: Start POC of generating a PDF using sample data

User Story: Start POC of front-end dummy page to be rendered locally

2021 Form 1095-B

1 / 3

- 100% +

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Form **1095-B**

Department of the Treasury
Internal Revenue Service

Health Coverage

► Do not attach to your tax return. Keep for your records.
► Go to www.irs.gov/Form1095B for instructions and the latest information.

☐ VOID
☐ CORRECTED

CMB No. 1545-2252
2021

Sb011d

Part I Responsible Individual

1 Name of responsible individual—First name, middle name, last name
Hello

2 Social security number (SSN) or other TIN
World

3 Date of birth (if SSN or other TIN is not available)
123-12-1234

4 Street address (including apartment no.)
T

5 City or town

6 State or province

7 Country and ZIP or foreign postal code

8 Enter letter identifying Origin of the Health Coverage (see instructions for codes): . . . ► ☐ Reserved

Part II Information About Certain Employer-Sponsored Coverage (see instructions)

10 Employer name

11 Employer identification number (EIN)

12 Street address (including room or suite no.)

13 City or town

14 State or province

15 Country and ZIP or foreign postal code

Part III Issuer or Other Coverage Provider (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

Part IV Covered Individuals (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)
at 12 months

(e) Months of coverage



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
23 Dependent One	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>
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For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Form **1095-B** (2021)

[←](#)
[→](#)
[🔄](#)
localhost:3001/1095b-download/

[Apps](#)
[DC Tech Cal](#)
[✓ Know it all](#)
[📺 The Mae Eye/glass...](#)
[👤 Women Make](#)
[🔥 Foot in the Door E...](#)
[👤 Discover your life...](#)
[📺 Book Marketing 1...](#)
[📺 Journey - WP Blo...](#)
[📺 Equation of line fr...](#)
[📺](#)
[📺](#)

U.S. Department of Veterans Affairs

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My VA

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[Level One](#)
[Level Two](#)
[1095-B Tax document](#)

Section Name

Nav section

Second nav section

Link

Current section

Link


Third nav section

1095-B tax document (proof of health coverage)

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* 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


[Download current 1095-B tax document \(PDF\)](#)


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

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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.](#)

www.link.com


1095B (2).pdf

Our POC shows how we can pull from a set of sample data and pull it into a PDF

POC of front-end page

[POC PDF Generation Video Recording](#)

We laid the foundation for our backend and started our Rails model to handle our database

[User Story:](#) Understand how to provision S3 bucket and database

[User Story:](#) Set up Rails model to map to table and standup database table

Rails Model connects our application to the database where we have the PDF data stored, allowing us to grab the data, and fill out the PDF for the Veteran to download.

```
t.string :veteran_icn, null: false

t.string :first_name, null: false
t.string :middle_name
t.string :last_name, null: false
t.date :birth_date
t.string :ssn # only need to store last 4; is string because first character can be 0
t.string :address, null: false
t.string :city
t.string :state
t.string :country
t.string :zip_code
t.string :province
t.string :foreign_zip
t.boolean :coverage_months, array:true, null: false
t.integer :tax_year, null: false # validate that only one exists per vet, per year
t.datetime :last_modified, null: false # , default: DateTime.now
t.boolean :isCorrected, default: false
```

To set up for the next stage, we documented how the existing enrollment system and our product would work together

User Story: Align with Technical POCs on approach and handoffs

Confirmed with Enrollment System POC Joshua Faulkner that:

- A. Enrollment Systems will send 1 new flat file approximately 2 times each week
- B. Flat file will maintain format specified in PDF doc that was sent to us (ACA-MEC_ICD_2.0.pdf)
- C. Enrollment System will provide dump of all 1095-B data for initial population of database
- D. Enrollment System is responsible for maintaining batch script that sends flat files
- E. Enrollment Systems will provide any necessary security credentials needed for S3 bucket to receive flat files.

We are now aligned for the next sprint to begin pulling data from the Enrollment System

33 lines (25 sloc) | 1.88 KB

<> [Icons]

Enrollment System Handoff Document

This document serves to document requirements and open questions for the MOVE tech team collaboration with the Enrollment System team so that the 1095-B tax forms can be served smoothly in a digital format to veterans and continue to function in the future.

Handoff Requirements / Assumptions from Enrollment System (ES)

- ES will send 1 new flat file approximately 2 times each week
- Flat file will maintain format specified in PDF doc
- ES will provide dump of *all* 1095B data for initial population of database
- ES is responsible for maintaining batch script that sends flat files
- ES will provide any necessary security credentials needed for S3 bucket to receive flat files


Checklist of Items to Resolve

- Credentials needed so S3 bucket has permissions to receive flat files from Enrollment System
 - Credentials for all environments (development, staging, production)
- Need a way populate the database the first time (as opposed to simply running updates) with all 100 million+ veteran data
- Batch script set up that sends data from enrollment system to S3 bucket twice a week
 - Align on what times/days the data is sent
 - Align what happens if there is no new data (empty file, no file?)
- System in place to detect/fix batch script if anything goes wrong
 - Who owns operations? IE. if enrollment system changes format
- How to communicate errors back to enrollment system (corrupted data during ingestion, etc)
- How does Enrollment System split up the text files?
 - IE veteran vs beneficiary, are they separate files?
 - Or are they in the same file?

[Handoff document link](#)

We mapped out our draft of our path to launch in detail

User Story: Create sprint-by-sprint product roadmap for 1095-B

EPICS	SPRINT 2	SPRINT 3	SPRINT 4	SPRINT 5
Find the Form		<ul style="list-style-type: none"> As a Veteran, I want to quickly navigate to my form once I log in As a Veteran, I want to use VA.gov search functionality to easily search for my form 	<ul style="list-style-type: none"> As a Veteran, I want to easily find the form through Google so that I can find it through my normal methods As a Veteran, I want to use VA.gov search functionality to easily search for my form 	
Access the Form	<ul style="list-style-type: none"> Start POC of front end dummy page to be rendered locally POC of PDF generation Align on handoffs with VA enrollment system team Understand how to provision S3 and database Set up Rails model to map to table and stand up database table Start to set up controller for endpoints currently blocked by S3 provisioning 	<ul style="list-style-type: none"> Provision backend for S3 bucket (or integrate with existing) Write POC for the script to get data from flat file to database Make POC script production ready e.g., add error handling Build data mapping to real data As a Veteran, I want to download my form so that I can have it for my records As a Veteran, I want to understand what the form is so I know what to do with it As a Veteran, I want to learn about the form so that I know whether or not to log in to download it As a Veteran, if I'm not logged in, I want to be redirected back to login to download the form 	<ul style="list-style-type: none"> User Acceptance Testing to validate how to access the 1095-B page – unauthenticated User Acceptance Testing to validate how to access the 1095-B form – authenticated Update from feedback from staging review 	Final updates from UAT and QA as needed
Get Help		<ul style="list-style-type: none"> As a Veteran, I want to ask a question or fix a mistake in my form to avoid any issues 		
Design	<ul style="list-style-type: none"> Update conversation guide for second round of usability testing Update research plan for second round of usability testing Update designs to high fidelity Iterate designs based on VA-PO feedback Conduct UX testing and synthesize findings Draft cover letter and iterate on content 	<ul style="list-style-type: none"> Wireframe updates from VA-PO, Business Owner, Collab Cycle Run second round of user testing and synthesize Finalize content for landing page 	<ul style="list-style-type: none"> Iterate on wireframe edits from staging review QA build Iterate on content edits 	<ul style="list-style-type: none"> Iterate on designs for post-MVP build (e.g., Opt into paperless)
Collaboration Cycle	<ul style="list-style-type: none"> Research Plan Review #2 	<ul style="list-style-type: none"> Midpoint Review Content & IA Review Contact Center Review Privacy & Security Review 	<ul style="list-style-type: none"> Staging Review Analytics Review 	 MVP Launch

We identified potential options where a Veteran could opt in to paperless, digital delivery

User Story: Document proposed process for how opt-in would work

	1. Implemented by VA Profiles team	2. Implemented on the 1095-B landing page	3. Discuss potential changes to policy
Description	<ul style="list-style-type: none"> 1095-B landing page directs Veterans to the Profiles page (e.g., “Opt in to paperless, digital delivery – click here to be taken to your Profile page”) Box (e.g., checkbox) on VA profile page for Veteran to Opt-in Ability for Veteran to opt back out (sign up for mail again) 	<ul style="list-style-type: none"> 1095-B landing page has a box (e.g., checkbox) for Veteran to Opt-in with messaging (e.g., “Opt into paperless, digital delivery. By selecting this box and clicking Submit, you are consenting to no longer receive a mailed form and receive digital copies only.”) Ability for Veteran to opt back out (sign up for mail again) 	<ul style="list-style-type: none"> Explore potential policy change so it is no longer required for the VA to send a physical 1095-B and can provide a digital copy to all Veterans, if they didn’t opt in themselves Example option: all Veterans will no longer receive the mailing, unless they live in a state that requires to be mailed or they request it or could send 1 final round of mailing and notify that this is the last time it will be mailed unless the Veteran 'opts out' of digital delivery
Potential Benefits	<ul style="list-style-type: none"> All opt-in housed in one central location While it may take more time to build, it's more likely to be a holistic "enterprise-wide" solution 	<ul style="list-style-type: none"> Could be designed to be surfaced on same page where the Veteran downloads, so it's top of mind Matt Self has built an opt out of paperless process for another flow as precedent More within the control of our immediate team, as we could add it to our backlog to research, design and build, which allows us to drive the timeline more easily 	<ul style="list-style-type: none"> Does not require any work from the part of the Veteran to stop getting the mailed form Further builds momentum for paperless options at the VA Some precedent exists, as Matt Self was able to change policy for debt notifications
Considerations	<ul style="list-style-type: none"> Current capability does not exist; seems to be a net new build Unclear when this would get built It's not a place where all opt-in is stored and is built only for 1095-B, it becomes a buried option for the Veteran Address from the enrolment system might not be the same as the one on Profiles and would need to be reconciled Starts touching on bigger question of how we connect enrolment system with Profiles 	<ul style="list-style-type: none"> Unclear what the design would be yet (e.g., due to technical constraints, Matt Self had to build a full form in lieu of a checkbox). Would need Tech & Design to investigate further Based on Matt Self's opt out build, may be difficult and have complications on the backend 	<ul style="list-style-type: none"> Could take a long time to accomplish Not within our team's immediate control
Open Questions	<ul style="list-style-type: none"> What is Profile's roadmap? When would Profile be able to build an opt in to paperless? Could the 'opt-in' be stored in the enrolment system? Would it need another system to capture it? Next Steps: Filled out form to get in touch with Profiles team, awaiting POC from form 	<ul style="list-style-type: none"> Could the 'opt-in' be stored in the enrolment system? Would it need another system to capture it? Next step: Investigate with enrolment system POCs on if they could capture the opt-in field and timeline to do so 	<ul style="list-style-type: none"> How viable would this option be? Would the business have any interest in pursuing a policy change? Is the effort to change the policy worth the time, given the limited scope of the 1095-B document?

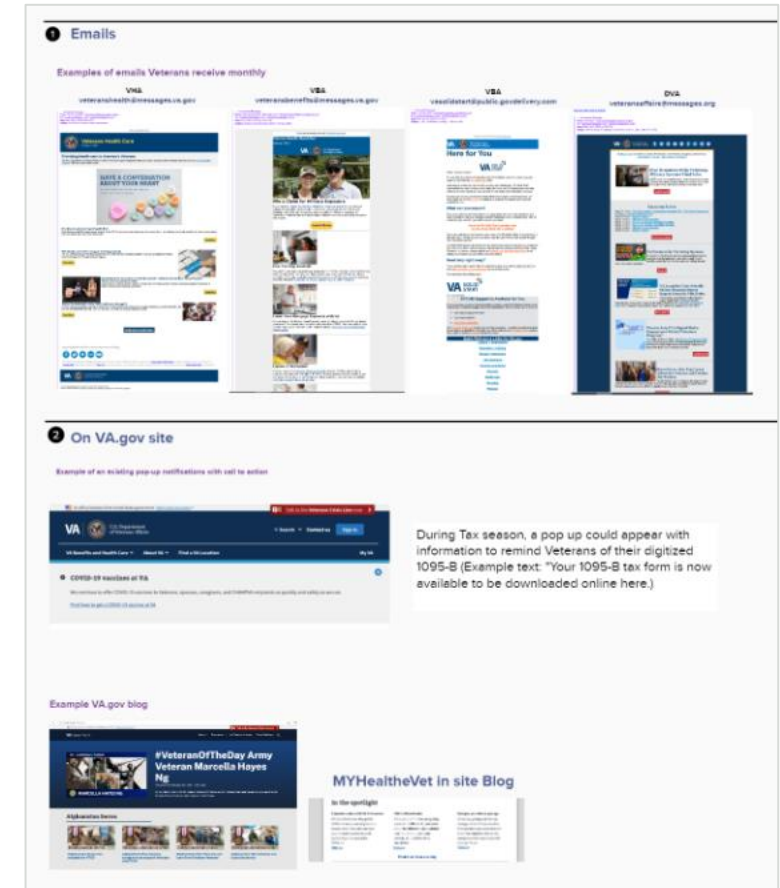
[Mural Board Link](#)

In order to notify Veterans once the form and opt in are launched, we ideated on possible ways to reach Veterans

User Story: Begin to identify rollout plan needs

Example of potential channels to reach Veterans and inform them once the digitized form is launched and/or they are able to opt into paperless, digital delivery:

- Emails – VHA, VBA, DVA
- VA.gov – top-bar notification, cross-links, posts on VA.gov blog
- Social media platforms – VA-owned (Twitter, Facebook, etc.) and non-VA owned (Veteran 2 Veteran info, etc.)
- VA.gov help line – e.g., insert a prompt about Form 1095-B into the hold message



[Rollout Plan Link](#)

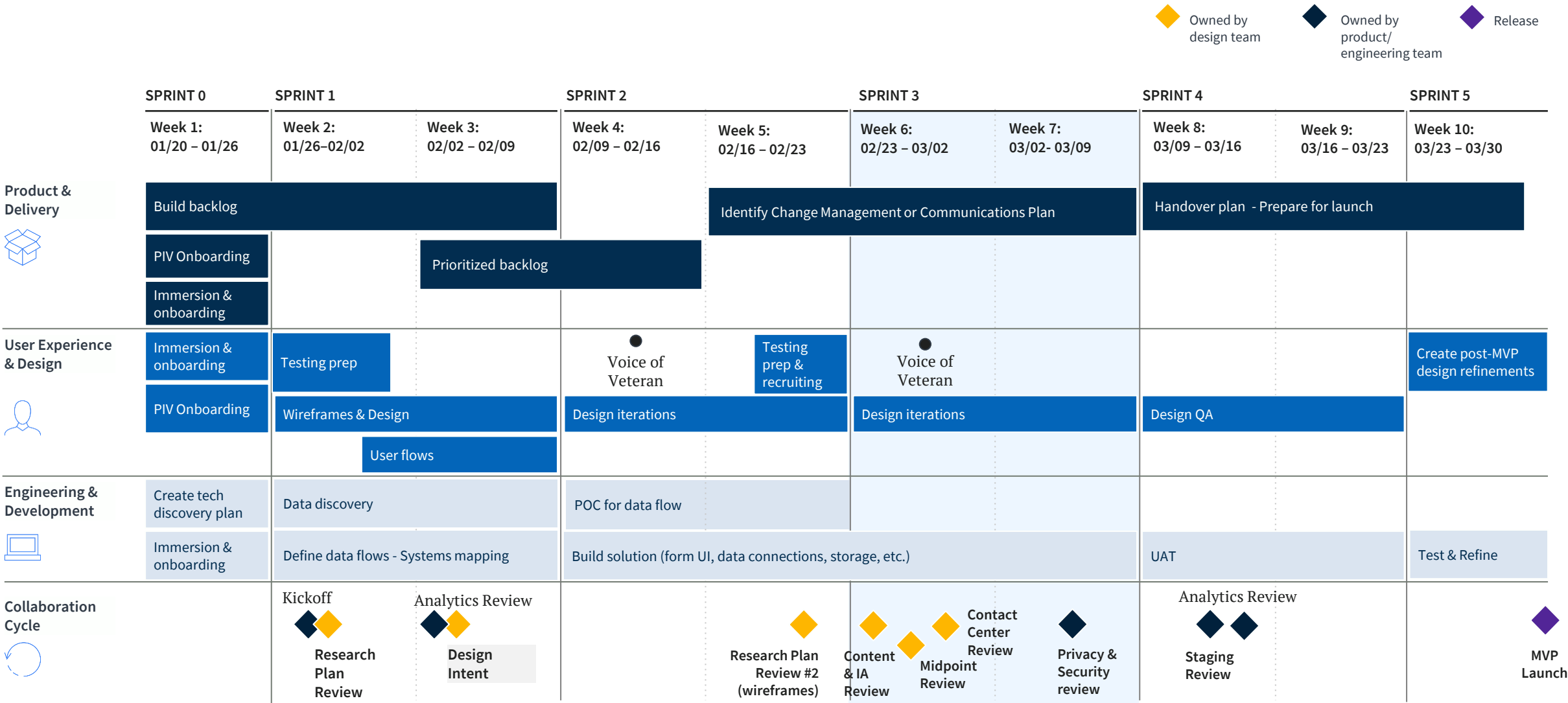
Sprint 2 Deliverables

EPIC	STORY	ESTIMATE	ASSIGNED	OUTPUT	REVIEWED WITH VA-PO	SPRINT TEAM GOAL COMPLETED?
Design	#36139 Conduct UX testing and synthesize	13	James	<ul style="list-style-type: none"> Research Report in GitHub Notes Excel Design Review Deck 	2/17/22	✓
Design	#36181 Update designs to high fidelity	8	Grace	<ul style="list-style-type: none"> Unauthenticated wireframe Authenticated wireframe 	2/17/22	✓
Design	#36143 Iterate designs based on VA-PO feedback	3	Grace	<ul style="list-style-type: none"> Unauthenticated wireframe Authenticated wireframe 	2/17/22	✓
Design	#36711 Draft cover letter and iterate on content	5	Carl	<ul style="list-style-type: none"> Cover letter 	2/17/22	✓
Design	#36171 Update conversation guide for second round of usability testing	2	James	<ul style="list-style-type: none"> Conversation guide #2 	2/22/22	✓
Design	#36166 Update research plan for second round of usability testing	1	James	<ul style="list-style-type: none"> Research plan #2 	2/22/22	✓
Tech	#36479 Start POC of generating a PDF using sample data	8	Nadya	<ul style="list-style-type: none"> Recording in Mural 	2/17/22	✓
Tech	#37013 Start POC of front-end dummy page to be rendered locally	5	Nadya	<ul style="list-style-type: none"> Github Branch 	2/22/22	✓
Tech	#36506 Understand how to provision S3 bucket and database	3	Teagan	<ul style="list-style-type: none"> AWS Access ticket (Teagan) S3 bucket request 	2/17/22, 2/22/22	✓
Tech	#37011 Setup Rails model to map to table and standup database table	8	Teagan	<ul style="list-style-type: none"> GitHub branch 	2/22/22	✓
Tech	#36478 Align with technical POCs on approach and handoffs	3	Nadya	<ul style="list-style-type: none"> Handoff document 	2/17/22	✓
Product	#36481 Create sprint-by-sprint product roadmap for 1095-B	5	Ashley	<ul style="list-style-type: none"> Tickets in Zenhub Slide 30 as overview of plan 	2/17/22	✓
Product	#36542 Document proposed process for how opt-in would work	8	Jordan	<ul style="list-style-type: none"> Opt In Options Mural Slide 31 as synthesis 	2/17/22	✓
Product	#36480 Begin to identify rollout plan needs	5	Jordan	<ul style="list-style-type: none"> Post MVP Communication Mural 	2/17/22	✓

SPRINT 2 DEMO

Preview of Sprint 3

Sprint 3 will run February 23rd to March 8



*Does not show post MVP Validate phase meetings in Collaboration Cycle, such as Full Accessibility Audit and Post-Launch Check In

Sprint 3 will focus on building out the PDF generation using real data on staging and conducting a second round of testing

*Stories subject to change during Sprint planning

1 PRODUCT

- A. Start the product guide and product video for the Contact Center review
- B. Create product video for Contract Center review
- C. Identify if generated PDF is 508 compliant
- D. Prepare for upcoming Collaboration Cycle milestones

2 DESIGN

- A. Run second round of user testing and synthesize findings
- B. Update prototype for second round of testing
- C. Finalize content for landing page
- D. Iterate designs based on feedback from VA-PO and research feedback
- E. Iterate designs based on Business Owner feedback
- F. Iterate designs based on Collaboration Cycle midpoint review feedback

3 TECH

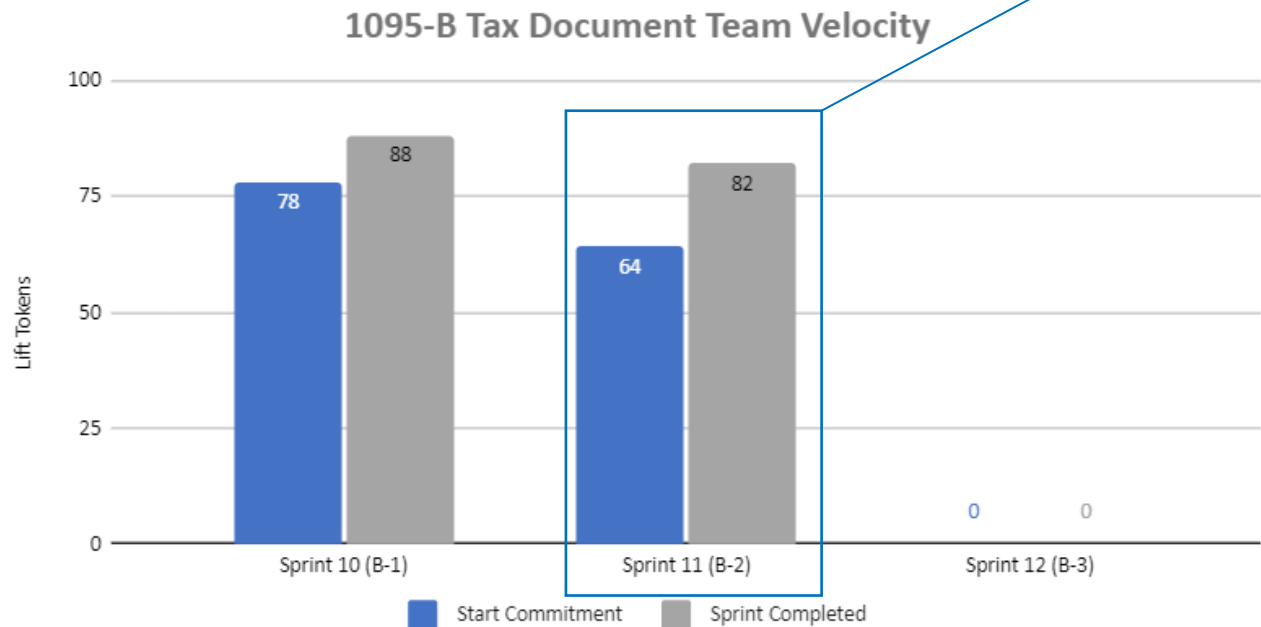
- A. Write POC for the script to get data from flat file to database
- B. Make POC script production ready
- C. Build data mapping to real data
- D. Start to set up controller for endpoints
- E. As a Veteran, I want to easily understand what this form is so I know why I need it
- F. Provision backend for s3 bucket (or integrate with existing)
- G. As a Veteran, I want to quickly navigate to my form once I log in
- H. As a Veteran, if I'm not logged in, I want to be redirected to log in to be able to download the form
- I. As a Veteran, I want to download my form so that my tax records are complete
- J. As a Veteran, I want to ask a question or fix a mistake in my form to avoid any issues

Next sprint demo: March 8

SPRINT 2 DEMO

Appendix

1095-B Sprint team velocity




Velocity details

- Velocity estimated in story points, using Fibonacci
- All 64 story points committed at beginning of the sprint completed and team exceeded commitment in this sprint
- Total completed for the sprint: 82 story points
 - Sprint 2 deliverables accounted for 77 points
 - 5 points were for platform orientation for new team member
- Added 13 points after sprint start as:
 - 8 points added for new team member with their capacity
 - 5 points added for additional capacity for other team members after new team member joined because we could now shift and spread the load
- Velocity in Sprint 2 accounted for 9 team members (one of whom is new to the team and joined two days after sprint start)

Project risks and mitigation strategies

Submitted as part of the Monthly Report on February 7th

RISK AND IMPACT	MITIGATION STRATEGY	DATE		STATUS	NOTES
		ENTERED	CLOSED		
IRS stakeholder is outside of VA ecosystem. Building without guidance or legal review regarding compliance with IRS regulation could result in risk.	Conduct research on available information surrounding current IRS 1095-B tax form regulations. Seek legal review through VA resources as directed by VA-PO and Business Owner	1/20/22	2/11/22		VA Business Owner clarified that IRS review is not needed