1095B Form Project Overview

Github Folder for Mo Studio to track work: va.gov-team/products/health-care/1095b-tax-form at master · department-of-veterans-affairs/va.gov-team (github.com)

Key Date: Deliver to Production by April 1.

Overview:
- 1095B is a tax form that VA provides to Veterans to prove that the veteran had health insurance through the VA in the past year.
- This form is currently mailed out which is expensive and many are returned due to inaccurate addresses.
  - It's about $1.5M to send them
  - Plus another ~$400K for those that are returned
  - Plus whatever it costs for the call center to contact the Veterans who returned it
- To decrease unnecessary cost and ensure delivery of the form to veterans, access to a digital form should be created.
  - The form will confirm which months VA recognizes that the veteran had health insurance coverage

Problem to Solve:
- Digitize 1095B form on va.gov so veterans can view the form, download the form, & be able to upload or print it for their taxes. This form will be a filled-in copy of the 1095B form for the veteran's records
  - The team needs to determine what systems and pages are available or what may need to be built in order to get the form, surface the form, view the form, download the form, and allow for veterans to find it again.

How does this map to our North Star?
It makes a digital version of a form available to Veterans which maps to self-service tools.
1. Increase availability of self-service tools
2. Decrease time to outcomes
3. Maximize satisfaction, reliability, availability, & security

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- Questions to answer and Discovery to understand the landscape
- Tech:
    - What systems are available and which have to be built?
    - What does the form look like (get examples and see if there are variations) to know what data is included?
        - What data is available and how can unique forms be found with this data?
        - Which systems do we need to work with if there are errors?
- Design (User Flow, IA, Content)
    - What does the form look like (get example) to know how the form has to be displayed?
    - What does the "request" view look like? I.e. Does a Veteran have to fill out any fields to get this document?
    - How do we display digitally?
    - How do we display it accessibly?
- Where does this form live on va.gov?
    - My Letters, My Docs, new space in the health apartment... ?
    - What are the steps for the veteran to find and download this form?
        - What information needs to be in a reference page to explain how the veteran can successfully get the form on va.gov?
- Letters and Records Team:
    - What have these teams learned and already built that could help solve this problem?
- Accessible PDF
    - What is required in terms of accessibility?
        - PDFs do not meet accessibility needs so how can this be surfaced for a11y compliance?
- Research plan with veterans and stakeholders
    - Understand pain points and areas for opportunity
- What is the escalation path if a veteran enters their information and the form is not found or the form is found but the information is incorrect? Who does the veteran contact, and how to get the information corrected?
- What are the required steps in the collaboration cycle?
- What are the requirements as a vfs team?
- Who are all of the stakeholders to meet with?
- What work or collaboration is required from other teams?

Minimum Deliverables:
- Space on va.gov production, with all steps required in order for the veteran to download their 1095B form
- Escalation path if information is incorrect on the form, or a form cannot be found
- Information page published as a reference for veterans to understand the process to get their 1095B form
    - Putting all the relevant information into va.gov style guide/plain language
- Form and user flow meets VA.gov design standards and has gone through the VFS collab cycle
    - ~~Researched with veterans through Perigean~~

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oCTO Teams:

Folks working on Forms:
- Include Matt Self because he's been building forms on va.gov for a long time
  - Claims & Appeals: PM Veronica Henry
  - eBenefits: PM Jason Wolf

Metrics (not exhaustive):
- Number of users who land on the 1095B page
- % of users who start and complete the form
- % of users who receive errors
  - Type of errors
- % of users who download the form
- % of repeat users to access the form
- Number of users who land on the info page
- Future: Reduction in cost for VA to send these out by mail.

Expectations:
- Mo Studio leads this project after the kickoff meeting
- Evidence-based decisions are required
- A roadmap is provided to PO (Tracey Mulrooney) by end of sprint 3.
- PO (Tracey Mulrooney) will setup and be at all meetings with stakeholders outside of oCTO
- PO (Tracey Mulrooney) is in the initial conversation with oCTO stakeholders and Mo Studio is empowered to meet with them thereafter.
- PO (Tracey Mulrooney) is informed of any issues impacting sprint delivery prior to sprint demo
- PO (Tracey Mulrooney) meets regularly with Mo's PM to discuss the team's progress toward delivery
- Work is clearly tracked in a way that the PO (Tracey Mulrooney) is able to see what is being done on a day to day basis.
- Keep Readme folder in github up to date.