Everything you might need to know about 1095-B paperless delivery

Making the case: Why this product, and for whom?

Business context

Currently, the IRS 1095-B form is mailed to Veterans and dependents who receive health care through VA. Sending it by mail costs VA approximately $1.5M/year, and an additional $400,000/year to print and send corrected forms.

Goals

1. Reduce the number of paper 1095-B forms VA has to physically send out – thereby reducing the cost of printing and mailing
2. Allow Veterans and dependents to easily download a replacement if they lose their 1095-B form

Audience

Anyone who receives a 1095-B form from the VA. Typically, this will be

1. All living Veterans (based on HEC's definition of a Veteran) who VHA relationship. They have or have had healthcare through VA.
2. All dependents with an email address who have enrolled in healthcare (HEC has this list)

When this must be done by

Completion by October 2022 allows VA to start saving this year.

Releases

Release	Potential completion date	Description
Release 1	September 6, 2022	PDF and text versions of the 1095-B are available online, but everyone will get a paper version in the mail. Opt-in functionality is not available. See our [release plan](#) for more detail.
Release 2	December 2022	Users can opt-in for paperless delivery only of the 1095-B

Release 1: 1095-B form is available online

The best place right now to learn more about the MVP is to look at the documents listed in the README for the 1095-B repository.

Release 2: Users can opt-in to paperless delivery of 1095-B

How an opt-in feature might work

We've outlined below how an opt-in feature **might** work, pending further discussions with all the teams involved. The 'cards' below provide a bit more detail and indicate which teams are responsible for implementation. Notifications are separately listed below.

Description	Team	Completion date
On the 1095-B page, users can download their latest 1095-B form as a PDF or text file.	1095-B Jeanette Cantrell, MO studio jeanette@themostudio.com	Sep 6, 2022
On the MyVA preferences page, the user can opt-in to receive the 1095-B form digitally. This will start the data flow to stop the physical form from being mailed out to the user. ● It'll take about 8 sprints to do this work ● The team has already started	MyVA Samara Strauss samara.strauss@va.gov	Dec 1, 2002
Legal review of content ● This can be submitted once MyVA designs are complete	Health Apps / HEC / MyVA Heather Justice heather.justice@adhocteam.us	TBD
This preference is consumed and stored. We'll also need an audit trail for when the preference is changed, in case VA gets audited by the IRS	VA Profile Mike Richards michael.richard2@va.gov	Dec 1, 2022
Interaction with enrollment services to synchronize the preference data. This will be implemented as a push notification fired on a per-veteran-per-profile change basis.	VA Profile Mike Richards michael.richard2@va.gov	Dec 1, 2022

Change a field in the 1095-B print file, synchronizing the preference data. Any dependencies?	Enrollment services Joshua Faulkner Joshua.Faulkner@va.gov	TBD
From the 1095-B page, the user goes to VA.gov profile page to view 1095-B delivery preferences. Add a link on the 1095-B page to direct users to change their paperless delivery settings	Sitewide Randi Hecht randi.hecht@bloomworks.digital	TBD

Notifications

At this point in time, we are only considering email notifications.

Initial announcement: email that informs everyone that the 1095-B form is now available online.	
Audience	- All living Veterans (based on HEC's definition of a Veteran) with an email address and have a VHA relationship. They have or have had healthcare through VA (enrolled in healthcare). - All living dependents with an email address who have enrolled in healthcare (HEC has this list) and - They have not already opted-in to receive a paperless 1095-B
Content	Draft text
Timing and frequency	Based on best practices in email campaigns, we'll want to send this email out once a year for the first few years since we won't catch everyone who wants to opt-in the first time around.
Trigger	Manual trigger
Team responsible	Health apps team

Confirmation email – Digital	
Audience	Veterans and dependents who opt-in to receive the digital version of the 1095-B
Content	Draft text

Timing and frequency	Veteran or dependent opts-in on VA.gov profile page (when saved).
Trigger	Automated trigger using VA Notify guide book
Team responsible	VA.gov Profile + VANotify

Confirmation email – Letter	
Audience	Veterans and dependents who change their preference to receive the paper version of the 1095-B
Content	[Draft text](#)
Timing and frequency	Veteran or dependent opts-out on VA.gov profile page (when saved).
Trigger	Automated trigger
Team responsible	VA.gov Profile + VANotify

Email sent annually lets recipients know that the latest 1095-B is now available online.	
Audience	● Veterans who have previously opted-in to paperless delivery ● Dependents who have previously opted-in to paperless delivery
Content	[Draft text](#)
Timing and frequency	Sent once a year (usually late December or early January).
Trigger	Once the form for the user is available, the notification should be sent. It takes a few days for all the forms to be generated. That way, we can send emails over a few days, vs. all at once.
Team responsible	Health Apps

How to measure success and decide what's next

Measuring success

1095-B opt-in analytics

Analytics to track opt-in	
Description	Implement analytics to understand opt-in behavior ● Percentage of users who click on the paperless delivery link on the 1095-B page ○ And the percentage of users who then choose to opt-in ● Number of users who choose paperless delivery online (regardless of how they get there) ● Percentage of users who click on the campaign to sign users up for paperless delivery
Team responsible	Health apps, Analytics, VA Notify (for campaign tracking)

Other metrics we might track related to 1095-B and paperless delivery

Analytics to track opt-in	
Description	● Percentage of receivers of the form who have opted-in to paperless delivery ○ Associated cost savings to VA ● Percentage/number of users who switch back to getting the physical form after having chosen paperless delivery ●