

HEC 1095-B Updates

Monday, June 27th, 2022

VA



U.S. Department
of Veterans Affairs

MOVE

Get to know the new members on team

Core team

PRODUCT



Munish Sikka
Washington DC
Product Lead



Tami Corson
North Carolina
Clinical SME / Scrum

ENGINEERING



Shashank Khandelwal
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Tech Lead

DESIGN



Thomas McCue
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Principal Designer
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Carl Dickerson
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Content Strategist
and Plain Language
Content Creator



Carolyn Williams
Chicago, IL
Experience Designer



Teagan Stephenson
Ft. Lauderdale, FL
Backend Engineer

Executive team



Jeff Scheire
MO Studio



Marcy Jacobs
McKinsey & Co



Kevin London
Frog Design



Will Reynolds
SERVE Advisory



Ben Morris
Pluribus Digital



Travis Hoffmann
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Agenda

Product goal:

To create and accessible, usable, and discoverable digitized IRS 1095-B tax document on VA.gov and build for opt-in to digital delivery (paperless option).

1095-B MVP

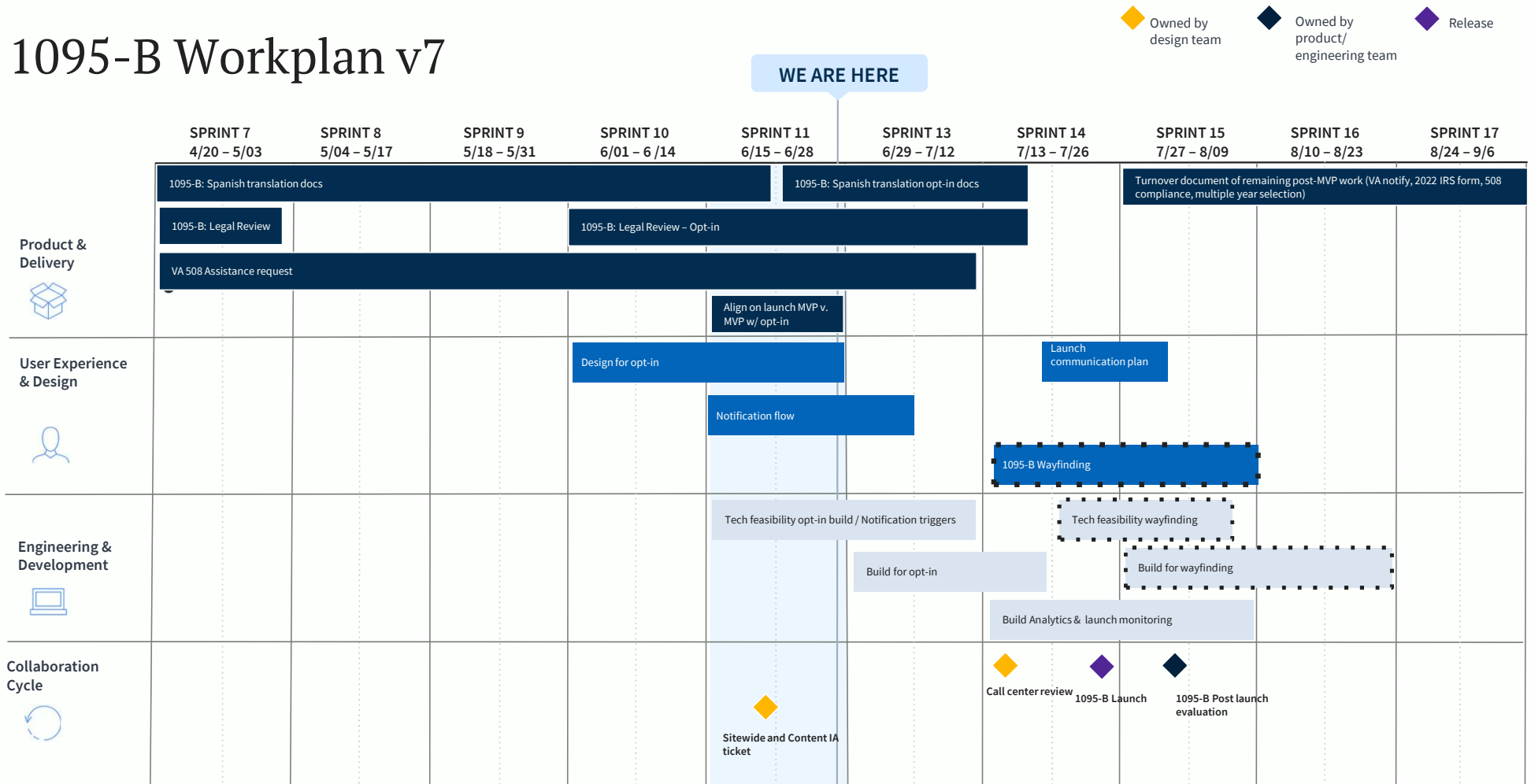
- A. Blockers
- B. Next steps
- C. Status of 508 accessibility work
- D. Working with VA Notify on initial email announcing launch

Opt-in to Digital Delivery of 1095-B

- A. New web page designs for HEC approval
 - B. Preparing for legal review
 - C. Building email notification triggers (opt-in/opt-out, annual)
 - D. Building profile - DFAS example
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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.



1095-B Workplan v7



HEC 1095-B Updates

1095-B MVP

Blockers for 1095-B MVP launch

BLOCKER	OWNED BY	ACTION NEEDED	DATE ENTERED	STATUS	NOTES
PDF Accessibility	Tarsha Tremble (Business Owner)	<ul style="list-style-type: none">· Ticket in for assistance from VA 508 office· Troubleshooting data format as a block to accessibility· Exploring alternate format for 1095-B production for those with sight readers· Potential alignment with IRS on HTML build	Sprint 3 – 3/3/22		Ongoing work to resolve
Spanish Translation	Tarsha Tremble (Business Owner)	<ul style="list-style-type: none">· Follow up with content finalization and translation progress	Sprint 10 – 6/14/22		June 28 expected date

1095-B MVP remaining actions, with external dependencies

ITEM	WORK STREAM	ACTION NEEDED	TARGET COMPLETE DATE	PREREQUISITE
Launch	Product & Tech	<ul style="list-style-type: none"> Work with tech to create a vets-website release 	July 2022	508 solution
UAT	Product & Tech	<ul style="list-style-type: none"> Follow Collaboration Cycle guidelines for UAT Identify Veterans within VA to conduct UAT, send access, and follow up to ensure testing complete 	TBD	Product dark launched
Post Launch Check- In	Product	<ul style="list-style-type: none"> Complete Collaboration Cycle milestone to KPIs post launch 	TBD (One month after launch and announcement)	Product launched in prod
Links from VA.gov pages to 1095-B	Product & Design	<ul style="list-style-type: none"> Work with IA team to have other identified pages within VA.gov (e.g., ACA page) link to the 1095-B page Work with IA team to have 1095-B page added to navigation and be found in VA.gov search 	June or later	Product launched in prod; aligned on comm plan with Tarsha, Tracey
1095-B update strategy	Product	<ul style="list-style-type: none"> Align on who will own 1095-B long term, including updating the PDF template each year 	May or later	Product complete and launched in production
Communications to announce launch	Product & Design	<ul style="list-style-type: none"> Work with Tarsha and HEC team to refine drafted communications and align on plan and timeline to announce 1095-B launch to Veterans Work with VA Notify team to build and launch communications on their platform 	October - December 2022	Product launched in prod; aligned on communication plan with Tarsha/Tracey



508 Accessibility Analysis

Team reviewed populated 1095-B document with screen reader technology:

- Blank PDF from IRS - Passed
- Flat data - Failed
- Non-flatten data - Failed
- Form without privacy data - TBD

Options to investigate:

- ✓ • Use text version of 1095-B (discussion on next page)
- Offer PDF and text options
- Have IRS build 1095-B HTML
- Fix privacy data, if issue, and continue with 1095-B as built

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Department of the Treasury
Internal Revenue Service
OMB No. 1545-2252
560118

Form 1095-B
2021
Health Coverage

-- VOID
-- CORRECTED

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

Part I Responsible Individual
1 Name of responsible individual-First name, middle name, last name ----
2 Social security number (SSN) or other TIN ----
3 Date of birth (if SSN or other TIN is not available) ----
4 Street address (including apartment no.) ----
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): ----
9 Reserved shaded

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.)
23
(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 all 12 months --
(e) Months of coverage
-- Jan
```

[1095-B Text version](#)

IRS 1095-B text document options

Options:

- Build a second widget / content for sight deficient to upload text version of 1095-B
- Expand current widget with second primary button and content for downloading text version of 1095-B
- Change output of widget to text version only and amend content to express that output of current widget would be text version of 1095-B
- Change widget to personalize output based on sight status of veteran. Amend content to include language to express this personalization.

Download your IRS 1095-B tax form

Download your 1095-B IRS tax form to show proof that you had VA health coverage in the most recent tax year.

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

[Download your 1095-B tax form \(PDF\)](#)

To open your form, you'll need the latest version of [Adobe Acrobat Reader](#). It's free to download.

Using a screen reader or experiencing difficulties with PDF? Download the text only version of this form. Text files are an acceptable IRS alternative for providing your tax information and can be opened or read by any program that reads text, including word processing programs, screen enlargers, refreshable Brailled displays and screen reading software.

[Download your 1095-B tax form \(text file\)](#)

Download your IRS 1095-B tax form

Download your 1095-B IRS tax form to show proof that you had VA health coverage in the most recent tax year.

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

[Download your 1095-B tax form \(PDF\)](#)

[Download your 1095-B tax form \(Text\)](#)

Note on accessibility: Text files are an acceptable IRS alternative for providing your tax information and can be opened or read by any program that reads text, including word processing programs, screen enlargers, refreshable Brailled displays and screen reading software.

To open the PDF version of this form, you'll need the latest version of [Adobe Acrobat Reader](#). It's free to download.

Download your IRS 1095-B tax form

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

[Download your 1095-B tax form \(Text\)](#)

Note: Text files are an acceptable IRS form for providing your tax information and can be opened or read by any program that reads text, including word processing programs, screen enlargers, refreshable Brailled displays and screen reading software.

[Download your 1095-B tax form \(Text\)](#)

Note: This document is available in PDF or as a Text file. Based on your accessibility setting in your profile, we have automatically provided you the text only version of this form. Text files and can be opened or read by any program that reads text, including word processing programs, screen enlargers, refreshable Brailled displays and screen reading software.

[Need a different format? Get the downloadable PDF version of this form](#)

[1095-B Sketch file](#)

Building Triggers for notification

Initial Notification of enrollees:

- “Blast” email notification
- Manual trigger by 1095-B Team or HEC
- Notification letter content created and build into VA Notify

Initial Announcement
Audience: All Veterans
Timing: Product launch late 2022
Trigger: Manual trigger

From: U.S. Department of Veteran Affairs

Subject: Your IRS 1095-B tax form is now available online

Dear [First_Name],

In an effort to reduce paper and provide more convenient options for Veterans to access documents, we have now made the IRS 1095-B tax form (proof of health coverage) available online. If you would like to opt-in to paperless delivery and no longer receive this form in the mail, please update your notification preferences in your profile at: <https://va.gov/profile/notifications>.

You can always visit <https://www.va.gov/records/download-your-irs-1095-b> to download and/or print a copy of your 1095-B for your tax records.

Thank you,

VA.gov

Annual notification of enrollees of new tax year 1095-B:

- Selective email to those who are opt-in to email notifications
- Trigger built by 1095-B team to roll when new tax template uploaded
- Notification letter content created and built into VA notify by

Yearly Automated Notification
Audience: Veterans who have selected paperless delivery
Timing: Triggered when 1095-B is available, late December/early January

From: U.S. Department of Veteran Affairs

Subject: **IMPORTANT** HEALTH COVERAGE TAX DOCUMENTS AVAILABLE

Dear [First_Name],

Your [year] IRS 1095-B tax form (proof of health coverage) is now available for download. If you would like a copy for your records, please visit: <https://www.va.gov/records/download-your-irs-1095-b>.



Thank you,
 VA.gov

Link

HEC 1095-B Updates

1095-B Opt-in to Digital Delivery

Potential Blockers for 1095-B Opt-in

BLOCKER	OWNED BY	ACTION NEEDED	DATE ENTERED	STATUS	NOTES
Legal Review	Tarsha Tremble (Business Owner)	<ul style="list-style-type: none">Office of General Counsel to understand requirements and perform legal review	6/14/2022		OGC will also have to approve VA Profile opt-in build
Spanish Translation of HEC documents w/ Opt-in content	Tracey Mulrooney (Product Owner)	<ul style="list-style-type: none">Follow up with content finalization and translation progress	Sprint 10 – 6/14/22		June 28 expected date

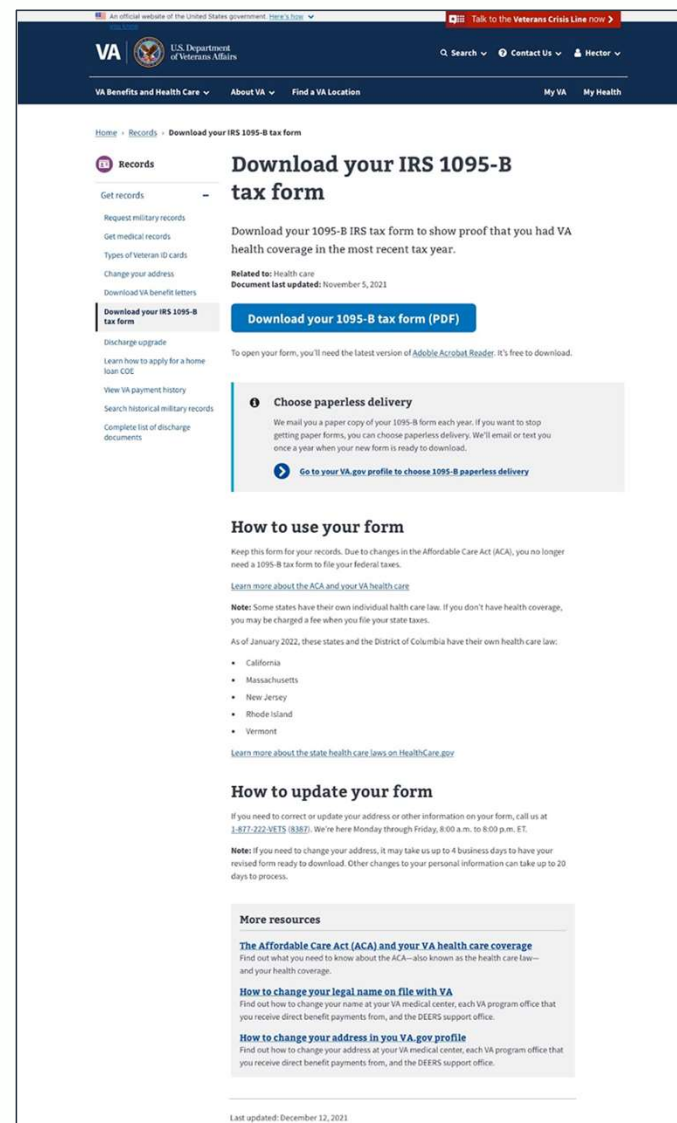
Design for opt-in to digital delivery of 1095-B

Requirements:

- Provide communication and path to user profile allowing users to opt-in for digital form retrieval only

Design Considerations:

- Plain language instructions
- Clearly define the “what for” of this information
- Placed near digital download button to reinforce association with form retrieval function
- Component selection that frames and highlights without distracting



[1095-B Sketch file](#)

Preparing for legal review

Legal guidance:

- 2021 Instructions for forms 1094-B and 1095-B (12.9.2021) - [link](#)
- 21st Century Integrated Digital Experience Act - [link](#)
- 26 CFR 1.6055-2 Electronic Furnishing of Statements - [link](#)
- Summary – Presidential Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government – [link](#) , [EO link](#)

Initial Notification of opt-in:

Paperless Confirmation

Audience: Veterans who have updated their 1095-B delivery preferences

Trigger: Triggered by change of 1095-B preference

V1: For Veterans going paperless

From: U.S. Department of Veteran Affairs

Subject: Paperless delivery confirmation IRS 1095-B tax form

[First_Name],

You have successfully enrolled in paperless delivery for your IRS 1095-B tax form. Moving forward, you will no longer receive a copy of this form in the mail. To download and/or print a copy of your most recent tax year's 1095-B, visit: <https://www.va.gov/records/download-your-irs-1095-b>.

Thank you,

VA.gov

Update your notification preferences at: <https://va.gov/profile/notifications>.

Notification of opt-out:

V2: For Veterans changing preference back to mail & digital

From: U.S. Department of Veteran Affairs

Subject: You have successfully updated your 1095-B preferences

[First_Name],

You have successfully updated your IRS 1095-B tax form delivery preferences. Our records show that, moving forward you would like to receive this form in the mail. As forms have already been mailed for this tax season, your changes will take effect for next year. If you need a copy of your 1095-B mailed to you immediately, please contact the Enrollment Center at 1-877-222-VETS (8387).

To download and/or print a copy of your most recent tax year's 1095-B, visit: <https://www.va.gov/records/download-your-irs-1095-b>.

Thank you,

VA.gov

Update your notification preferences at: <https://va.gov/profile/notifications>.

1095-B Opt-in remaining actions, with external dependencies

ITEM	WORK STREAM	ACTION NEEDED	TARGET COMPLETE DATE	PREREQUISITE
Launch MVP	Product & Tech	<ul style="list-style-type: none"> Work with tech to create a vets-website release 	July	508 Exception request
1095-B Opt-in build	Product	<ul style="list-style-type: none"> Follow up with HEC and Profiles team to ensure 1095-B opt-in is done Ensure changes in profile reflect in HEC to prevent mail of those that opt-in Update draft communications and announcement plans, based on when opt-in will be launched 	June - Aug	Legal review
Notification Triggers	Design & Tech	<ul style="list-style-type: none"> Notification letters approved by legal Build triggers for opt-in, opt-out, annual update 		Legal review
Legal Review	Product	<ul style="list-style-type: none"> Work with Tarsha to complete legal review for Opt-In 	June – Aug	POC name from Tarsha
Communications to announce launch	Product & Design	<ul style="list-style-type: none"> Work with Tarsha and HEC team to refine drafted communications and align on plan and timeline to announce 1095-B launch to Veterans Work with VA Notify team to build and launch communications on their platform 	October - December 2022	Product launched in prod; aligned on communication plan with Tarsha/Tracey
Launch opt-in	Product & Tech	<ul style="list-style-type: none"> Work with tech to create a vets-website release 	September - October 2022	