

To validate our vision for the product, we spoke to 8 Veterans in this final round of testing

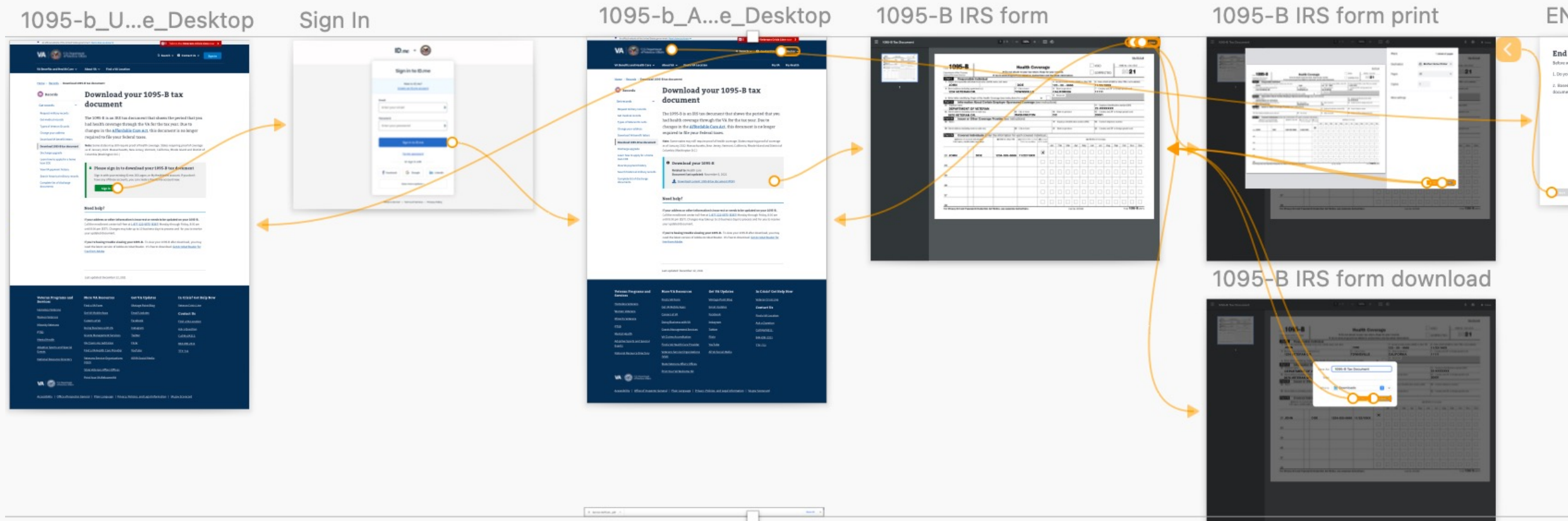
User Story: Run second round of user testing and synthesize

- 8 30-minute research sessions with Veterans completed,
 - 12 scheduled: 8 completed, 3 cancelled, 1 no show
- 2 Parts of the session included:
 - 10-minute interview, 20-minute usability test with prototype of proposed solution
- 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

Tami:
Insert GitHub
links

Research notes and synthesis

We conducted “think aloud” evaluative testing with a high fidelity prototype



High Level Findings

- **8/8** Participants successfully completed the task
(Sign in, View 1095-B Form, then Download or Print)
- **7/8** Participants would prefer updating incorrect information on the website rather than calling the enrollment line
- **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
- **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
 - All participants lived in states that don't require proof of health care to file State taxes

Tami:
Insert link

Research notes and synthesis

Research Theme: Do I need this?

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?

“I don't really need it...[but] I filed it with my income tax paperwork. I don't know that anybody really needs it. Because there doesn't seem to be a lot of follow up with the IRS.”

– Participant 11

Research Theme: Do I need this?

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 its no longer required."

– Participant 3

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 \(PDF\)](#)

Research Theme: Fixing the Form

6/8 Participants found the Help sections 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.

An official website of the United States government. [Here's how you know](#)

Talk to the **Veterans Crisis Line** now

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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

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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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 \(8387\)](tel:1-877-222-VETS) 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.](#)

Research Theme: Fixing the Form

7/8 Participants said they would prefer to correct any mistakes on the form digitally, either by filling in a form or sending a secure message.

Some reasons being:

- “[With an online form] I could get a digital receipt” -P4
- “I prefer secure messaging if someone got back to you to confirm it was changed.” – P1

The remaining participant preferred the phone or visiting the VA in person so “I don’t have to worry about making a mistake.” This participant was elderly, rarely used their computer and still filed their taxes using paper forms.

Recommendations

- Design is strong and ready to launch
- Add additional content on “Change Your Address” landing page directing user to call enrollment center, should they follow that path to update the form
- 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).