

**Registration, Enrollment and Eligibility (REE)
ENROLLMENT SYSTEM CHANGE REQUEST**

*Instructions: Items shown in **green** are required. If you are not sure of an answer, please provide a response and note that further information may be needed. Send the completed form to [VHA REE Triage Team](#).*

A. Request Title

Title	1095-B Opt-in to paperless delivery
Request Type	New Functionality <input checked="" type="checkbox"/> Existing Functionality <input type="checkbox"/> New Data Service <input type="checkbox"/>
Date Submitted	08/11/2022

B. Requestor Information

Requestor Name, Title, and Office	Tarsha Tremble, MPM, FA-COR, FAC P/PM, Management Analyst, Member Benefits Section, VHA-HEC
Phone	404-431-8123
Email	Tarsha.tremble@va.gov
Business Owner	Tarsha Tremble, MPM, FA-COR, FAC P/PM, Management Analyst, Member Benefits Section, VHA-HEC
Phone	404-431-8123
Email	Tarsha.tremble@va.gov
Requirements and Testing Support - Name, Title, Office	Joshua Faulkner, Technical Director, EHBD, Development, Security, and Operations
Phone	719-559-3201
Email	Joshua.faulkner@va.gov >

C. Additional Stakeholders

Administration	Enterprise Wide <input type="checkbox"/> VBA <input type="checkbox"/> VHA <input checked="" type="checkbox"/> NCA <input type="checkbox"/>
System/Application/Service	Registration <input type="checkbox"/> Eligibility <input type="checkbox"/> Enrollment <input checked="" type="checkbox"/> IVM <input type="checkbox"/> Other <input type="checkbox"/> Please specify: <u>MVI and Vet360</u>
Partner Program Office(s)	HEC <input checked="" type="checkbox"/> OCC Eligibility <input type="checkbox"/> Vet360 <input type="checkbox"/> Other <input type="checkbox"/> Please specify: <u>HRC</u>
Partner Integration Concerns	N/A
Additional Stakeholders	Tracey Mulrooney < tracey.mulrooney@va.gov >
Stakeholder Concerns	Support of VA.gov work already in progress through VA's Office of the CTO in OI&T, addressing ability of Veterans to Opt-in to paperless delivery of annual 1095-B tax document.

D. Description of the Request

Problem Statement	Currently, Veterans are unable to voice their preference for paperless delivery of sensitive annual tax forms, as they are with other institutions such as banking, investment, and employment services. To address the voice of Veterans preferring to opt-in to paperless delivery of 1095-B, a digital pathway will need to be built jointly with VA Profile team and Enrollment services at HEC. Currently the government spends \$1.5M to
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	send the letters through the mail and an additional \$400k for mail that is then returned. The government could save a large portion of this expense by allowing Veterans to select a digital version for this form rather than have the form sent in the mail.
Business Need Statement	<p>Overview:</p> <ul style="list-style-type: none"> 1095-B is an annual tax form that VA is mandated by the IRS to provide Veterans that demonstrates proof that the Veteran had health insurance through the VA in the past tax year. This is currently mailed out which is expensive, and many are returned due to inaccurate addresses. <ul style="list-style-type: none"> ≈\$1.5M to mail them ≈\$400K for those that are returned for correction Cost to call center for staff trying to reach Veterans and correct delivery information is unknown 67% of Veterans who participated in VA.gov's moderated usability research into 1095-B in February of 2022, preferred having a paperless delivery option, similar to banking, investment, and employment services To address Veteran's preferences and simultaneously reduce VHA cost, and time associated with correcting misdirected tax mail; Veteran's should be able to indicate their delivery preference for the 1095-B tax form
Anticipated Outcome	Veterans have ability to select their delivery method preference for the annual 1095-B tax document.
E. Requirements Description	
<p>Desired (To Be) Functionality</p> <p><i>(If this request incorporates multiple requirements, please enter the desired functionality and acceptance criteria on this spreadsheet and submit with this form.)</i></p>	As a Veteran, I want to not receive a physical copy of the 1095-B tax document when I opt-in to paperless delivery of the 1095-B form.
Acceptance Criteria	<ol style="list-style-type: none"> ES captures the opt-in or opt-out preference from VA Profile ES captures the time stamp from VA Profile for the change in preference The value is stored in ES Customer Care centers are able to update the opt-in/out preference which is sent back to VA Profile ES removes the Veterans who have chosen to receive digital delivery from the file sent to the print vendor
Do User Stories/Business Requirements for the requested change already exist?	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p><i>(If yes, include supporting documentation.)</i></p>

F. Business Priority

Business Request Priority	<input checked="" type="checkbox"/> High	<input type="checkbox"/> Medium	<input type="checkbox"/> Low
	High/Critical: A critical requirement without which the product is not acceptable to the stakeholders; required for the next release.	Medium/Important: Supports necessary system operations; required eventually but could wait until a later release if necessary.	Low/Desirable: A functional or quality enhancement; would be nice to have someday if resources permit, but the product functions well without it.
Business Request Score	Please review the Scoring Criteria on the last page of this form, and select the appropriate score for each item below.		
Veteran Impact Score: 2	Mandate/Legislation Score: 4	Risk/Opportunity Score: 2	Business Continuity Score: 0
Strategic Alignment Score: 5			

G. Proposed Timeline

Requested Delivery Date	December 1, 2022.
Key Milestone Dates	List critical tasks and associated OIT milestone dates related to this request In order to reduce the expense for mailing the 1095B tax form, this work needs to be in production in December, before the file is sent to the print vendor. Otherwise, the next benefit is Dec 2023. This work is in conjunction with OIT VA.gov team (work began 8/8/2022) and VA Profile (prioritized but needs confirmation of ES work to begin before they start).



H. Alignment with VA Priorities, Intended Metrics & Business Request Priority

Please provide SMART goals: Specific, Measurable, Achievable, Relevant and Time-Related

Alignment with VA Priorities	This project aligns with VA North Star goals by: “Making a digital version of a form / document 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, and security
Metrics associated with Requirements	Please provide the metrics associated with the requirements. How will the success or failure of implementing the requirements be measured or reported? Please ensure metrics are tied to the anticipated outcome(s). 1) Number of veterans who download the 1095B tax form 2) Number of veterans who opt-in for digital delivery 3) Cost for sending out the initial 1095B forms by mail 4) Cost for sending out corrected 1095B forms by mail 5) Number of calls to the call center in regards to 1095B form
Consequences of Inaction	Inaction will result in: 1) Not being responsive to the voice of the Veteran regarding preference for paperless delivery option for annual IRS 1095-B tax document 2) Continued reliance on mail delivery for IRS 1095-B tax document delivery and resolution of misdirected sensitive

	tax documents estimated at \$1.9M for tax year 2021 with escalating cost of 3.3% per annum. <i>(**percent increase is related to historic increase in cost of first-class mail delivery)</i>			
I. VIPR Status				
VIPR Status	Submitted <input type="checkbox"/> In Progress <input type="checkbox"/> Complete <input type="checkbox"/> On Hold <input type="checkbox"/>			
VIPR Number and Date Submitted	If VIPR status is entered, please enter corresponding number and date			
VIP Funding Acquired	Yes <input type="checkbox"/> No <input type="checkbox"/>			
OIT Product (System) Owner	Joshua Faulkner < Joshua.faulkner@va.gov >			
OIT Project Manager	Unknown			
J. Minimum Viable Product (MVP)				
Could a minimum viable product (MVP) be deployed with sufficient features to satisfy early customers and enable collection of feedback for future development?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	There is no MVP, this is a single feature of non-complex tool.	
K. Disposition of the Intake Request (Note: This section will be completed by the Triage Team)				
Triage Outcomes				
Intake Review Results	Scoring: Total Weighted Score: <div style="width: 50px; height: 15px; background-color: #a6a6a6; border: 1px solid black;"></div>		All required information received? Yes <input type="checkbox"/> No <input type="checkbox"/> Exceeds scoring threshold? Yes <input type="checkbox"/> No <input type="checkbox"/>	
<u>Veteran Impact</u>	<u>Mandate/Legislation</u>	<u>Risk/Opportunity</u>	<u>Business Continuity</u>	<u>Strategic Alignment</u>
Weight:	Weight:	Weight:	Weight:	Weight:
Score:	Score:	Score:	Score:	Score:
Wtd Score:	Wtd Score:	Wtd Score:	Wtd Score:	Wtd Score:
Overall:	<u>Impact</u> <input type="checkbox"/> Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Significant <input type="checkbox"/> Major	<u>Severity</u> <input type="checkbox"/> Low <input type="checkbox"/> Medium <input type="checkbox"/> High <input type="checkbox"/> Critical	<u>Priority</u> <input type="checkbox"/> Low <input type="checkbox"/> Normal <input type="checkbox"/> High Attention <input type="checkbox"/> Resolve Immediately	Target Build:
Project Area: Select			Comments	
Category: Select			Comments	
Dependencies: (Identify systems and/or business initiatives that are expected to be impacted by this request.)				
Communication/Training Impact: Minor <input type="checkbox"/> Moderate <input type="checkbox"/> Significant <input type="checkbox"/> Major <input type="checkbox"/>				
Intake Outcome	<input type="checkbox"/> Approved <input type="checkbox"/> Return to Business for Additional Information <input type="checkbox"/> Disapproved <input type="checkbox"/> Under Review		Comments	
Date:				

Intake Request ID		Rational ID
Team Assigned		
Team POC (Name, Email, Phone#)		

Prioritization Criteria/Scoring Matrix					
Criteria Score  	Value-Add to Veterans and Beneficiaries	Mandated (Legislation, SecVA Priority)	Risk, Issue, Opportunity Mitigation	Business Continuity	Alignment with VA, VHA, and/ or PO Strategic Plan
5	Highest direct impact on Veterans and Beneficiaries	Immediate compliance required; severe legal and/or economic impact	Risk level HIGH and strategy addresses multiple program areas	Lights on; multiple systems/ programs; serious impact to overall operations	Key strategic initiative designated by VA/VHA/PO Exec Team
4	Medium-High direct impact on Veterans and Beneficiaries	Immediate compliance required; slight-moderate legal and/or economic impact	Risk level HIGH and strategy addresses single program area	Lights on; single system/ program; significant impact to mission critical operations	Key strategic initiative across multiple directorates – Directors Agreement
3	Medium direct impact on Veterans and Beneficiaries	Compliance required, but no legal and/or economic penalty	Risk level MED and strategy addresses multiple program areas	Lights on; multiple systems/ programs; with moderate impact to operations	Single directorate key strategic initiative; Director designated
2	Low direct impact on Veterans and Beneficiaries	Internal audit finding of high risk	Risk level MED and strategy addresses single program area	Lights on; single system; medium impact to 1 or more program area operations	Department level key strategic initiative
1	No direct impact on Veterans and Beneficiaries	Internal audit finding of medium risk	Risk level LOW and strategy addresses multiple program areas	Single system with impact to operations of single program area	Department level initiative aligned with department priorities
0	Could negatively impact Veterans and Beneficiaries	No compliance/ regulatory impact	Risk level LOW and strategy addresses single program area	No impact to business continuity	No alignment supporting strategic objectives