1095-B TAX DOCUMENT

## Sprint 3 Design Review

Friday, March 3<sup>rd</sup>, 2022

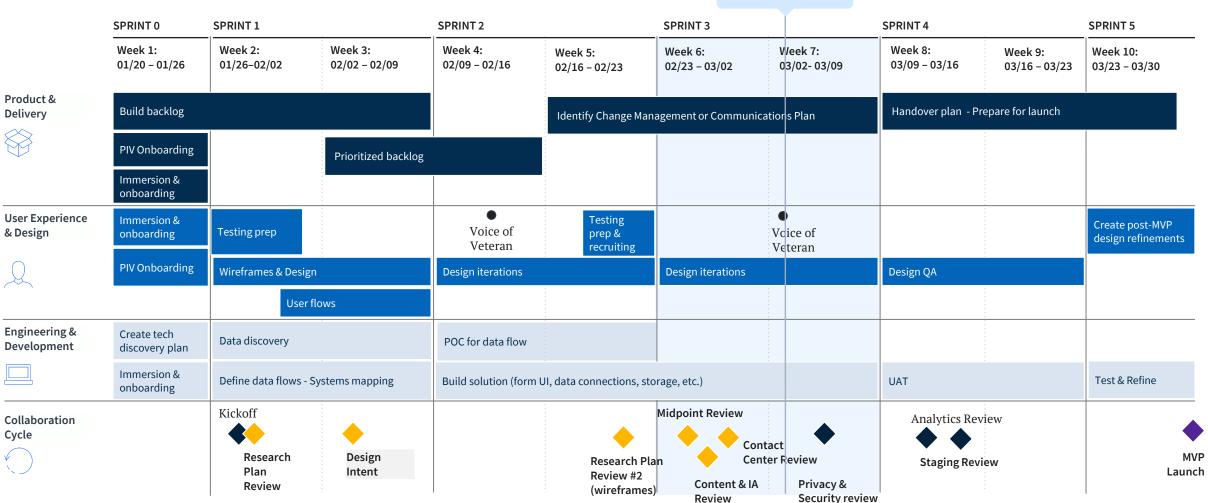




## 1095-B Project status & workplan



#### **WE ARE HERE**



 $<sup>{\</sup>rm *Does\ not\ show\ post-MVP\ Validate\ phase\ meetings\ in\ Collaboration\ Cycle, such\ as\ Full\ Accessibility\ Audit\ and\ Post-Launch\ Check\ In\ Post-Launch\ In\ Post-Launch\ Check\ In\ Post-Launch\ In\ Pos$ 

03-04 Design review 2

## Agenda

<sup>01</sup> Research

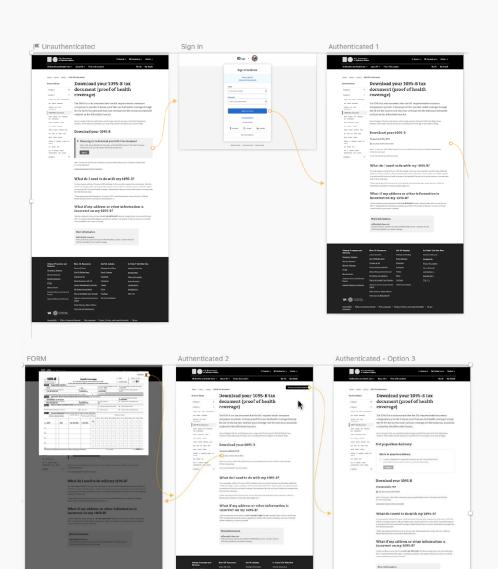
High fidelity designs

03-04 Design review Agenda 3

#### A quick reminder

### Round 1 Research

- Design and content was well received, clear and easy to use
- The main flow from sign-in to download was well understood, participants found the download CTA quickly
- Method to fix errors with the 1095-B PDF was clear
- Most participants felt that Records was the place they would look first to locate the 1095-B document, as it's a record of their health care



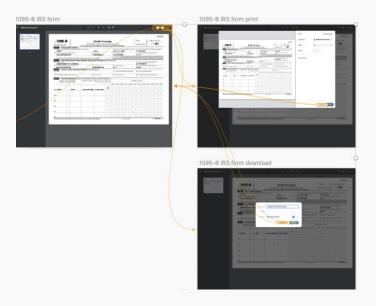
## Round 2 Research Prototype

#### High fidelity designs:

- Improved visual hierarchy in high fidelity designs and joined office hours for questions around the Design System
- Reduced some written content to be more direct and less redundant; Clarified content on state requirements and included the affordable care act link in body copy

The prototype included high fidelity screens with versions for: unauthenticated, authenticated and paperless opt in versions along with simulated sign-in page and 1095-B PDF





#### <u>Prototype</u>

## Round 2 Research: Overview

- 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
- Full research findings report, will be delivered for Sprint 3

03-04 Design review Research 6

## Round 2 Research: Early themes

- 8/8 Participants completed the task
  - Design and content was well received, clear and easy to use
  - The main flow from sign in to download was well understood, participants found the download CTA quickly
- Method to fix errors with the 1095-B PDF was fairly clear
  - Directions with how to fix information, near the download CTA, has been easy for users to locate
  - When prompted what they would do if their address was wrong on the form, a few (# to confirm) they responded they would select "Change your address" on the left column
- 7/8 Participants agreed with the landing page being part of the records section
- 7/8 Participants responded they would prefer digital download on the VA website rather than getting a copy in the mail
  - Final question of session: "Based on what you've seen today, would you prefer getting the 1095-B document on the VA website rather than getting a copy in the mail?"

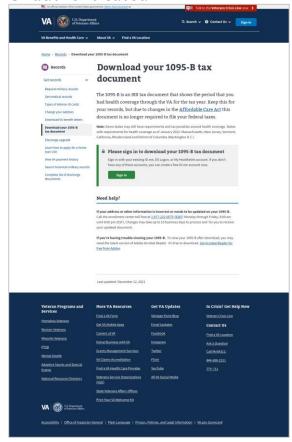
03-04 Design review Research 7

**SPRINT 3** 

# High fidelity design

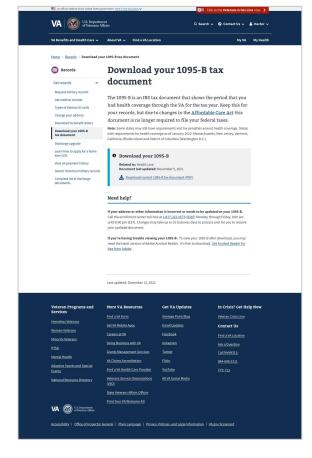
## 1095-B Landing page

#### Unauthenticated





#### Authenticated





Landing page link

Home > Records > Download your 1095-B tax document



#### Get records

Request military records

Get medical records

Types of Veteran ID cards

Change your address

Download VA benefit letters

Download your 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

#### 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. Keep this for your records, but due to changes in the Affordable Care Act this document is no longer required to file your federal taxes.

Note: Some states may still have requirements and tax penalties around health coverage. States with requirements for health coverage as of January 2022: Massachusetts, New Jersey, Vermont, California, Rhode Island and District of Columbia (Washington D.C.).

#### 10 Download your 1095-B

Related to: Health care

Document last updated: November 5, 2021

Download current 1095-B tax document (PDF)

#### Need help?

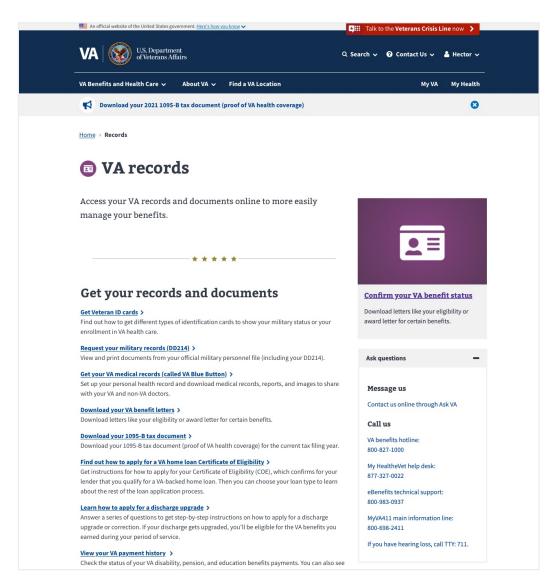
If your address or other information is incorrect or needs to be updated on your 1095-B.

Call the enrollment center toll-free at 1-877-222-VETS (8387) 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.

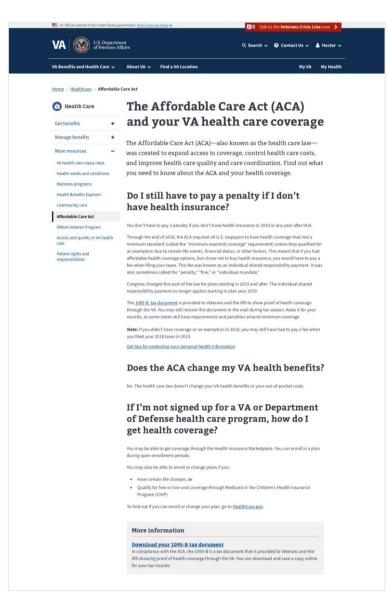
Landing page link

- Records hub and hublevel notification option
- Affordable Care Act
- Search results: Top recommendations ("best bets") up to two
- Note: <u>Per conversation</u> <u>with Mikki (IA)</u>, she is aligned that this would like not be a Top 5 task for the homepage or mega menu



Records hub link

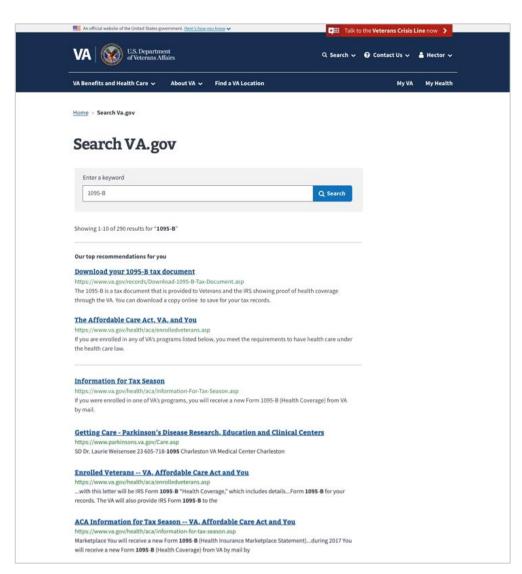
- Records hub and hublevel notification option
- Affordable Care Act
- Search results: Top recommendations ("best bets") up to two
- Note: <u>Per conversation</u> <u>with Mikki (IA)</u>, she is aligned that this would like not be a Top 5 task for the homepage or mega menu



Affordable Care Act link

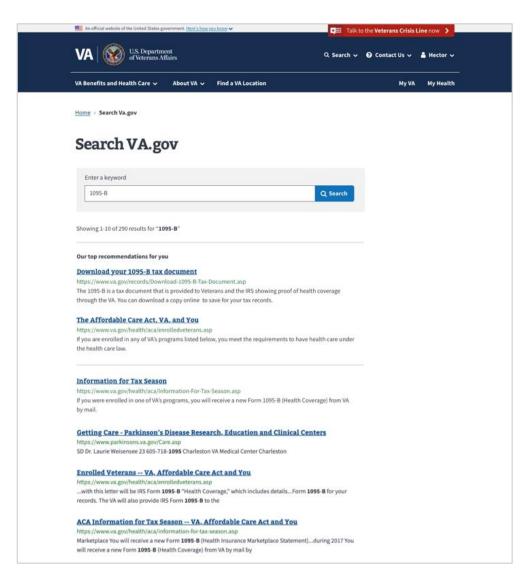
- Records hub and hublevel notification option
- Affordable Care Act
- Search results: Top recommendations ("best bets") up to two
- Note: <u>Per conversation</u> with <u>Mikki (IA)</u>, she is aligned that this would like not be a Top 5 task for the homepage or mega menu

Note the recommendation to adjust ACA link to the new VA.gov webpage on this (not legacy)



Search screen link

- Records hub and hublevel notification option
- Affordable Care Act
- Search results: Top recommendations ("best bets") up to two
- Note: <u>Per conversation</u> <u>with Mikki</u> (IA), she is aligned that this would like not be a Top 5 task for the homepage or mega menu



Search screen link

## **Next Steps**

- Complete round 2 of user testing with high fidelity designs, further exploring preferences around updating the form (if information is incorrect) and how the participants understand the requirements of keeping the 1095-B document and including it their taxes.
- Incorporate any additional edits post-Midpoint review and completion of user testing.
- Prep for Sprint 3 demo.