

Design review

Sprint 4 — June 9, 2022

Agenda

- Health Hub — IA tree tests status
- 1095-B review
- Health Hub — research next steps

IA tree test status

Timeline

- June 6 — Research plan submitted
- **June 7 — Perigean begins recruiting, tests open to participants**
- June 13 — Recruitment over, tests open to all participants
- June 28 — Testing closes
- June 29 — Research synthesis begins
- July 7 — Design Review: Research synthesis presentation

Participant update

- H0 — Veterans

- 24 completed
- 0 abandoned

- H1 — Veterans

- 16 completed
- 2 abandoned

- HB — Veterans

- 21 completed
- 1 abandoned

- H0 — Caregivers

- 1 completed
- 0 abandoned

- H1 — Caregivers

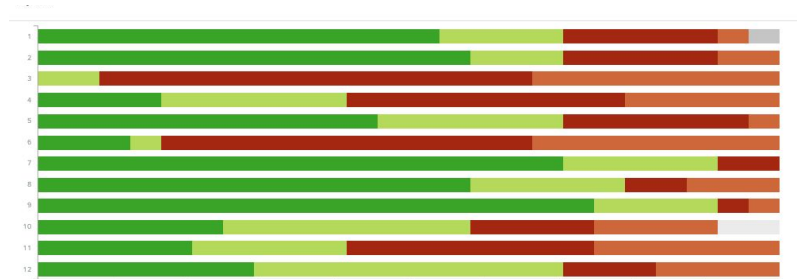
- 0 completed
- 0 abandoned

- HB — Caregivers

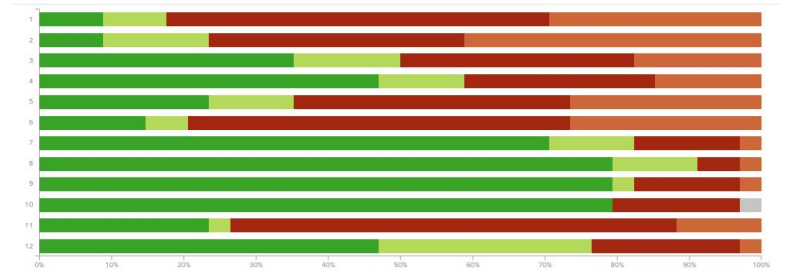
- 0 completed
- 0 abandoned

Task statistics

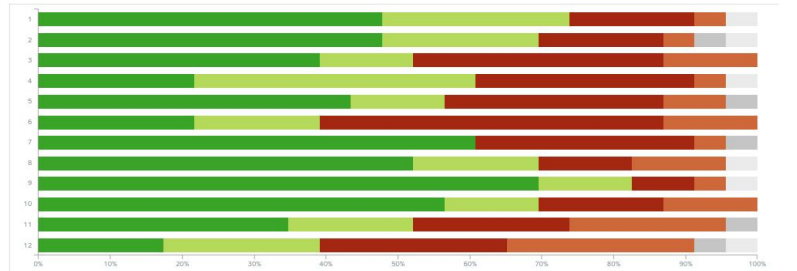
Veteran baseline



Veteran H0



Veteran H1



Tree tasks

1. As a Veteran, you want to know if you can get VA health care
2. You're a Veteran who wants to enroll in VA health care.
3. As a Veteran, you want to know if you can get dental benefits through VA.
4. You want to know what types of services and support you can get for your mental health needs.
5. You want to find out the costs for VA health care services.
6. You just received your new disability rating. You want to find out how this could affect how much you would have to pay for VA health care.
7. As a Veteran with VA health care, you want to send your VA health records to a non-VA provider.
8. You want to check how much you owe for your last medical visit and pay your bill.
9. You need to request a refill for a prescription you get from VA by mail.
10. You have a question for your doctor and want to communicate with them online.
11. You want to know if VA will pay for you to get health care outside of VA.
12. You drove to your VA primary care appointment and want to get paid back for the cost of gas.

Initial thoughts on a first pass at analysis

- Eliminate outlier tasks that perform poorly across both hypotheses and baseline (but come back to them for insight later)
- Overall look at performance of tasks by hypothesis
- Are there common tasks that perform better than others?
- What commonalities do those tasks have that might be making them perform better than others?
- Does one hypothesis stand out?
- Do trees perform better based on demographic lines, for example education or gender?
- Then we go deeper...

1095-B review

Design considerations for opt-ins

1. Content design — Emphasis on clarity and simplicity, with the intent of providing instructions and a path to the profile settings
2. Potential for confusion given the the opt-in action only applies to 1095-B
3. Component selection should present opt-in information and path without distracting from the primary intent of the page, which is to download the digital form.

Opt-in: Option 1

- **Message:** Content is intended to create awareness, provide instructions, and present a path to action.
- **Component:** The blue information box is intended for information content and actions. It highlights the opt-in information without being disruptive to the overall intent of the page.

An official website of the United States government [Learn how you benefit](#)

Talk to the **Veterans Crisis Line** now

VA U.S. Department of Veterans Affairs

Search Contact Us Hector

VA Benefits and Health Care About VA Find a VA Location My VA My Health

Home > Records > Download your IRS 1095-B tax form

Records

Get records -

- Request military records
- Get medical records
- Types of Veteran ID cards
- Change your address
- Download VA benefit letters
- Download your IRS 1095-B tax form**
- 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 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.

How to opt-in for paperless delivery only

By default your 1095-B is both sent to you in the mail each year, as well as made available for download online. If you would like to save paper and only get this form online when you need it, you can opt-in to paperless delivery by updating your delivery preferences in your profile.

[Manage your delivery preferences](#)

How to use your form

Keep this form for your records. Due to changes in the Affordable Care Act (ACA), you no longer need a 1095-B tax form to file your federal taxes.

[Learn more about the ACA and your VA health care](#)

Note: Some states have their own individual health care law. If you don't have health coverage, you may be charged a fee when you file your state taxes.

As of January 2022, these states and the District of Columbia have their own health care law:

- California
- Massachusetts

Opt-in: Option 2

- **Message:** A more explicit description of the opt-in action in the sub-head is followed by a clear direction as to what opting-in does.
- **Component:** Presentation of the information is more subtle. The component employed here presents the opt-in action without distracting from the primary intent of the page.

The screenshot shows the official website of the U.S. Department of Veterans Affairs. The header includes the VA logo, the text 'U.S. Department of Veterans Affairs', and navigation links for Search, Contact Us, and Hector. Below the header, there's a secondary navigation bar with links for VA Benefits and Health Care, About VA, Find a VA Location, My VA, and My Health. The main content area is titled 'Download your IRS 1095-B tax form'. It features a sidebar with a 'Records' section containing links like 'Get records', 'Request military records', 'Get medical records', 'Types of Veteran ID cards', 'Change your address', and 'Download VA benefit letters'. The 'Download your IRS 1095-B tax form' link is highlighted. The main content area has a sub-headline 'Download your IRS 1095-B tax form' followed by a description: 'Download your 1095-B IRS tax form to show proof that you had VA health coverage in the most recent tax year.' It also includes a 'Related to: Health care' section with a 'Document last updated: November 5, 2021' and a green button to 'Download your 1095-B tax form (PDF)'. Below this, it states 'To open your form, you'll need the latest version of Adobe Acrobat Reader. It's free to download.' and a section titled 'Go Paperless: Opt-in to paperless delivery only' with a choice of how to receive the form (online download or paper mail) and a link to 'Paperless settings'. The final section is 'How to use your form', which explains that the form is kept for records and that due to the Affordable Care Act (ACA), users no longer need a 1095-B tax form to file federal taxes. It includes a link to 'Learn more about the ACA and your VA health care' and a 'Note' about state health care laws. A list of states with their own health care laws is provided: California, Massachusetts, New Jersey, Rhode Island, and Vermont. A link to 'Learn more about the state health care laws on HealthCare.gov' is at the bottom.

Home » Records » Download your IRS 1095-B tax form

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.

Go Paperless: Opt-in to paperless delivery only

Choose how you want to receive this form. By default it is both mailed to you and available for online download. You can help reduce paper waste by opting in to paperless delivery.

[Paperless settings](#)

How to use your form

Keep this form for your records. Due to changes in the Affordable Care Act (ACA), you no longer need a 1095-B tax form to file your federal taxes.

[Learn more about the ACA and your VA health care](#)

Note: Some states have their own individual health care law. If you don't have health coverage, you may be charged a fee when you file your state taxes.

As of January 2022, these states and the District of Columbia have their own health care law:

- California
- Massachusetts
- New Jersey
- Rhode Island
- Vermont

[Learn more about the state health care laws on HealthCare.gov](#)

Iterations on design to include paperless opt-in

i How to opt-in for paperless delivery only

By default your 1095-B is both sent to you in the mail each year, as well as made available for download online. If you would like to save paper and only get this form online when you need it, you can opt-in to paperless delivery by updating your delivery preferences in your profile.

[Manage your delivery preferences](#)

Option 1

Go Paperless: Opt-in to paperless delivery only

Choose how you want to receive this form. By default it is both mailed to you and available for online download. You can help reduce paper waste by opting in to paperless delivery.

[Paperless settings](#)

Option 2

Updated documentation

HEC Documents

IRS 1095-B Tax Form (Proof of Health Coverage) User Guide



April 2022
Department of Veterans Affairs
Office of Information and Technology (O&T)

IRS 1095-B Tax Form (Health Coverage)

In compliance with the Affordable Care Act (ACA), the IRS 1095-B tax form is provided to Veterans and the VA to show proof of health coverage through the VA. Your 1095-B, like other tax documents, shows your name, address and social security number; it also shows a checked box for every month that you had health coverage through the VA for the previous year. Changes to the Affordable Care Act (ACA) that you have gotten rid of the fee for not having health coverage, so, in most cases the 1095-B will simply be a statement to keep for your records. Some states, however, will have their own individual health care law and may fine you for not having health coverage. You should check with your local state or tax preparer to find out.

Need a copy of your 1095-B?

Currently the VA mails a copy of the 1095-B tax form out to enrolled Veterans at the beginning of the year between December and March. You may also sign up for paperless delivery of this form and/or download a copy from your records on va.gov. To get a copy of your 1095-B online, visit <https://www.va.gov/records/download-your-irs-1095-b>.

If you have additional questions around the 1095-B and your VA health care coverage or see an error on the form, you can call us at the Health Benefits helpline at 1-877-222-VETS (8387). Services are available Monday through Friday, 8:00 am until 8:00 pm (EST) to answer your questions and assist in filing any errors on your form.

IRS 1095-B Tax Form (Health Coverage) Frequently Asked Questions

When and how do I get a copy of my 1095-B tax form?
Currently the VA mails a copy of the 1095-B tax form out to enrolled Veterans at the beginning of the year between December and March. You may also sign up for paperless delivery of this form and/or download a copy from your records on va.gov. To get a copy of your 1095-B online, visit <https://www.va.gov/records/download-your-irs-1095-b>.

You will receive the form in the mail package unless you opt for paperless delivery. You can select this option on the va.gov 1095-B download page or by calling the paperless delivery assistance helpline at 1-877-222-VETS (8387).

What do I need to do with the 1095-B?
No action is required to take with the form. The 1095-B is provided to you to retain as proof of health coverage for the Health Care Individual Responsibility, questions on your tax return. Alternatively, you may file your 1095-B with your state tax return if it is required by your state.

What if information on my 1095-B is incorrect or my information has changed?
If you make an error on your 1095-B, the number we received this is to update your contact information or your profile on va.gov. Once updated, a new 1095-B should be available for download within a few days.

If other things need to be made on your 1095-B, like your name, social security number, all the health benefits helpline at 1-877-222-VETS (8387). You may also sign up for paperless delivery of this form and/or download a copy from your records on va.gov. To get a copy of your 1095-B online, visit <https://www.va.gov/records/download-your-irs-1095-b>.

If I have to make a change to my 1095-B, how long will that take to come up?
Changes to your 1095-B are made on the va.gov website. Once you make a change, it will be updated to the va.gov website. It may take up to 30 business days for the form to be available for download on the va.gov website.

Who is supposed to receive a 1095-B?
All Veterans enrolled in health coverage through the VA will receive a copy of their 1095-B tax form. Even if you do not use the VA as your primary health care, you will still receive this form if you are enrolled.

If I received a 1095-B, am I required to use it?
No. If you do not have the filing requirements, you do not have to file the tax return solely because you received the 1095-B tax form. It is merely a statement to keep for your records. The ACA did not require health coverage.

Do I need to send it to the IRS even when I don't have any?
No. While the IRS requires you to file a return if you are required to file, it is not required. Veterans should not send it to the IRS and the form return as they normally would.

How long do I need to keep my 1095-B tax form?
You should keep your 1095-B tax form for at least 3 years.

Product Guide: Call Center Review

IRS 1095-B Tax Form (Health Coverage)

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Cover Letter



<Date Printed>

<VPID>
<First Name> <Middle Name or Middle Initial> <Last Name>, Suffix
<Address 1>
<Address 2>
<Address 3>
<City> <State>, <Zip>

<FIRST NAME> <LAST NAME>

Please keep this letter and the enclosed tax form for your <tax year> tax records.

The Affordable Care Act (ACA) requires the Department of Veterans Affairs (VA) to notify enrolled Veterans of their period of health care coverage during the previous calendar year. The law also requires VA to provide this notification to the Internal Revenue Service (IRS).

Enclosed you will find your IRS 1095-B tax form, which documents your VA health care period of coverage during <tax year>. No additional steps need to be taken with this document. The federal tax penalty for not having health coverage has been removed, but some states still have specific filing requirements. Follow your local state IRS instructions, as applicable, for completing the Health Care Individual Responsibility information on your tax return form.

Download this Form Online

Get a digital copy of your 1095-B at www.va.gov/records/download-your-irs-1095-b. If you would like to save paper, you can also opt-in for digital only delivery for this form.

Get Help and More Information

If you need to change the address on your 1095-B, you can do so by logging into your VA.gov profile and updating your contact information; a new form will be available for download within 4 business days.

If you need additional help or have questions, call us toll-free at 1-877-222-VETS (8387) Monday through Friday, 8:00 am until 8:00 pm (EST). You may also find additional information regarding the ACA on VA's website at www.va.gov/health-care/about-affordable-care-act/. For more information regarding the ACA's tax implications, visit www.irs.gov/affordable-care-act/individuals-and-families.

Thank you for your service to our Nation.

Sincerely,

Director, Health Eligibility Center
VAH Member Services

710-8804
Apr 2022

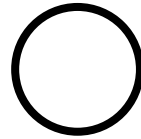
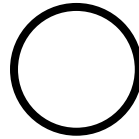
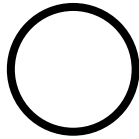
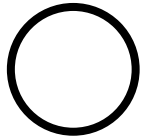
<https://mostudio.box.com/s/jaqtzcg1vwbgth1luh9lbzuum33ji18b>

Next Steps

- Submit sitewide ticket before opt-in legal approval?
- Send copy and designs to Tarsha for review (if needed)

Health Hub research next steps

Research next steps



Analyze tree test results

Workshops to analyze together
and share out synthesis

Build prototypes

Develop lo-fidelity prototypes
informed by tree test synthesis
that address placement

Prototype usability test

Test prototypes with
Veterans and Caregivers

Refine and iterate

Research goal and question

Goal: Use prototypes to test placement of and navigation to 'My Health' on VA.gov with Veterans and caregivers.

Questions:

1. Can Veterans find where to complete 'manage' and 'get' tasks starting from VA.gov?
2. Can Veterans navigate to the information or task they need when they land on a page from search (or a link they have)?

Next steps

- June 14 — Sprint Demo
- June 24 — Next Design Review:
 - Present preliminary conclusions from IA Tree Test findings
 - Update on Research Plan 2

Outline of Research Plan 2

- **Research goals**

- How might we create an experience that allows Veterans to easily find the content and tools they need based on where they are in their VA health care journey:
 - learning about the benefit
 - applying for the benefit
 - getting started with the benefit
 - or managing their care and health benefits?

We want to observe Veterans completing tasks related to health care benefits on VA.gov to evaluate navigation and wayfinding on the prototype based on the results from the previous IA tree test. We also want to learn the drivers, motivations, pain points of getting and managing health care benefits.

Outline of Research Plan 2

- **Research Questions**

- Does the placement and navigation of health care benefits allow Veterans to find the information and complete tasks that they need to do?
- What influence does page navigation and wayfinding have in how a Veteran interacts with their health care benefits?

- **Hypothesis**

- Appropriate cross-linking and wayfinding will refine the information architecture allowing Veterans to find the information they need and where to complete health-related tasks without frustration or delay.

- **Outcome**

- To understand (and build consensus) how to best organize the UX for 'get benefits' and 'manage benefits,' specifically for health care, on VA.gov. We'll use the UX insights from this research to build and test high-fidelity wireframes of the Health Hub.

Outline of Research Plan 2

- **Method**

- Moderated usability testing, 45 minutes
- Warm up questions related to health benefits
- Prototype usability testing

- **Recruitment**

- Recruit 15 participants accounting for ~5 no shows with 10 participants completing

- **Timeline**

- **Sprint 6** Review preliminary research synthesis and submit finalized research plan 2
- **Sprint 7** Recruitment and testing and synthesis

Prototypes

