



Date: December 14, 2015

DHCAA Operations Memo 15-46

To: Income Maintenance Supervisors
Income Maintenance Lead Workers
Income Maintenance Staff

Affected Programs:	
<input checked="" type="checkbox"/> BadgerCare Plus	<input type="checkbox"/> Caretaker Supplement
<input type="checkbox"/> FoodShare	<input type="checkbox"/> FoodShare Employment and Training
<input checked="" type="checkbox"/> Medicaid	
<input type="checkbox"/> SeniorCare	

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Division of Health Care Access and Accountability

1095-B Form Administration

CROSS REFERENCE

Process Help

EFFECTIVE DATE

January 11, 2016

PURPOSE

The purpose of this Operations Memo is to provide information about 1095-B tax form reporting and an overview of the 1095-B Administration tool in CARES Worker Web (CWW).

BACKGROUND

The Affordable Care Act (ACA) requires individuals to have health care coverage that meets a minimum standard called minimum essential coverage (MEC). The State of Wisconsin Department of Health Services (DHS) is required to send 1095-B forms to all individuals who were enrolled in a Medicaid or CHIP plan anytime during the year that meets the criteria to be considered MEC. DHS is also required to file 1095-B forms electronically with the IRS.

POLICY

AFFORDABLE CARE ACT HEALTH CARE REQUIREMENT

The Affordable Care Act requires most people to have health coverage that meets MEC standards. Individuals who do not have health coverage that meet MEC standards may be subject to a tax penalty unless they are exempt.

Certain individuals who do not have MEC may be exempt from paying the tax penalty. Exemptions are based on certain hardships, certain life events, health coverage, or financial status and membership in some groups. DHS does not determine who may be eligible for exemption from the tax penalty.

MINIMUM ESSENTIAL COVERAGE

Full benefit plans provided by Wisconsin Medicaid such as BadgerCare Plus or Medicaid for the Elderly, Blind or Disabled are considered MEC, while limited plans such as Family Planning Only Services or SeniorCare are not considered MEC. Only members who were enrolled in an MEC program will receive a 1095-B tax form.

Other examples of MEC include:

- Most health insurance coverage provided by an employer.
- Health insurance purchased through the Federally Facilitated Marketplace.
- Certain private health insurance purchased directly from an insurance company.

DHS is not responsible for sending a 1095-B form for any of the categories listed above.

The following plans and programs offered by the State of Wisconsin are **not** considered MEC. Members covered under these plans only will not receive a 1095-B form:

- Limited benefit plans, such as Family Planning Only Services or Emergency Services
- Express Enrollment for pregnant women
- SeniorCare
- Medicare savings programs:
 - o Qualified Medicare Beneficiary program
 - o Specified Low-Income Medicare Beneficiary (SLMB) program
- Coverage based on a met deductible

IRS REPORTING AND TAX FILING

The 1095-B form serves as proof of health coverage for members who were enrolled in a MEC plan during the tax year. Starting with the 2015 tax year, households that file taxes will need to use the information on the 1095-B form to answer MEC-related questions on their 1040 personal income tax return. The 1095-B form is not required to be filed with the 1040 tax return but members who file taxes should keep their 1095-B form and any tax dependents' 1095-B forms for their records. If the member does not file taxes, or the member is not a tax dependent of someone filing taxes, the member can disregard the 1095-B form.

DHS will mail out letters and forms to each individual who was enrolled in an MEC plan during the tax year. Since the 1095-B form contains some personal health information, the State of Wisconsin chose to send forms to the individual rather than to the household. Minors under the age of 18 who may not be responsible for filing taxes will receive his or her own copy of the 1095-B form.

1095-B FORM DETAILS

INITIAL, CORRECTED AND DUPLICATE 1095-B FORMS AND COVER LETTERS

DHS will mail a 1095-B form by January 31 to every individual who was eligible for at least one month of MEC during the previous tax year. The 1095-B form will be sent to the most recent address on record in interChange (iC).

Initial 1095-B forms for the previous tax year will also be issued throughout the year to anyone who gains coverage for the previous tax year after the annual mailing in January. These forms will be issued automatically and no worker action is needed.

Initial 1095-B forms are created through annual and weekly CARES batch processes or can be manually created through the new CARES 1095-B Administration tool. Included with the initial mailing of the 1095-B form is a cover letter explaining the purpose of the 1095-B form. To see a copy of this cover letter and a sample 1095-B form, see [Attachment #1](#).

If changes are made to demographic information or the months of MEC, the 1095-B form will be considered a corrected 1095-B form. Corrected forms may be issued through CARES batch processing or through the new CARES 1095-B Administration tool. Corrected 1095-B forms will be marked as corrected on the top of the form. In addition, a different cover letter will be sent with the corrected 1095-B form. To see a copy of this cover letter and a sample corrected 1095-B form, see [Attachment #2](#).

The member can request a duplicate copy at any time. Duplicate copies can be sent to a new mailing address if requested. When a member requests a duplicate copy, the member will receive the most recent 1095-B form and its original cover letter along with a separate letter explaining a duplicate 1095-B form was sent at the member's request. To see a copy of this letter, see [Attachment #3](#).

WISCONSIN 1095-B FORM ASSISTANCE PHONE LINE

The State of Wisconsin Department of Health Services has created a new member support phone line for members who need assistance in getting a 1095-B form or need more information about the 1095-B form. The Wisconsin 1095-B Form Assistance phone line is listed on all the 1095-B form cover letters for members receiving the 1095-B.

The agents responding to 1095-B related phoned phone calls can assist members with getting a duplicate copy and responding to 1095-B questions; however, these agents will be unable to create or make changes to a 1095-B form. Members who are reporting changes in demographic information or MEC information will be referred to the Income Maintenance (IM) agency or to the agency that determined eligibility if the MEC program eligibility is not determined through CARES.

CARES

CARES will receive 1095-B information from interChange containing MEC information through annual and weekly batch processes. The annual batch process will run at the beginning of the year to generate 1095-B forms for the previous tax year. The weekly batch process will run every week to catch any changes to eligibility that may have occurred during year for the previous tax year and mail initial or corrected 1095-B forms. For example, an application for BadgerCare Plus filed in February 2016 with a request for three months of backdated eligibility could potentially add eligibility for November 2015 and

December 2015. If the individual qualifies for backdated eligibility, a 1095-B form for 2015 will be mailed out to the member through the weekly batch process.

CARES will store the information received from interChange. Through the batch processes, CARES will automatically create or correct a 1095-B form and send it to the member. If CARES creates or corrects a 1095-B form during the annual or weekly batch processes, it will be stored as a record for the tax year in the 1095-B Administration tool.

Certain MEC programs where eligibility is not in CARES such as Well Woman Medicaid, Foster Care Medicaid, or Katie Beckett will have 1095-B information stored in CARES. However, if updates need to be made to the 1095-B form, the member will have to work with the appropriate agency like the Social Security Administration (SSA) for SSI Medicaid, the Aging and Disability Resource Center or other related agencies depending on the program to update their demographic or MEC information.

The 1095-B Administration tool is a new worker tool added to CARES Worker Web for 1095-B management. The rest of this memo will describe the new tool and its functionality in more detail.

1095-B ADMINISTRATION TOOL Users

All Income Maintenance (IM) workers, IM leads, and IM supervisors are allowed to change the information on the 1095-B form or create a new 1095-B form. The Wisconsin 1095-B Form Assistance phone agents and IM clerical staff will have access to search, print or mail duplicate forms or update a mailing address for a duplicate form but will not be able to change or create a 1095-B form.

1095-B ADMINISTRATION TOOL

The 1095-B Administration tool will store 1095-B information for members who have received a 1095-B tax form. Since 2015 is the first tax year that DHS is sending 1095-B forms, there will only be one tax year on record.

The 1095-B Administration tool will also allow users to send duplicates, change the mailing address for the 1095-B form only, issue a corrected form, create a 1095-B form as needed, and view history on when the most recent 1095-B form for the selected tax year was mailed to the member.

In CWW, the 1095-B Administration tool can be found under “Worker Tools” in the left Navigation Menu.



Figure 1 CWW Navigation Menu with the 1095-B Administration Tool Added

SEARCHING FOR A MEMBER'S 1095-B FORM

The 1095-B Search page will appear after selecting the 1095-B Administration tool from the navigation menu. On this page, the user can enter search criteria to find a member with a 1095-B form. All users with access to the 1095-B Administration tool will be able to look up a member's 1095-B record.

The user can search for the member's 1095-B record using one of two options:

1. Demographic information: If the user chooses this option, both first and last name will be required and birth date will be optional to complete the search.
2. Individual Identification Numbers: If the user chooses this option, only one identifier can be entered to complete the search. If more than one identifier is entered, the worker will be unable to search.

Note: If an individual is calling about 1095-B forms for multiple household members, it may be easier to search by case number rather than any of the other individual identification numbers.

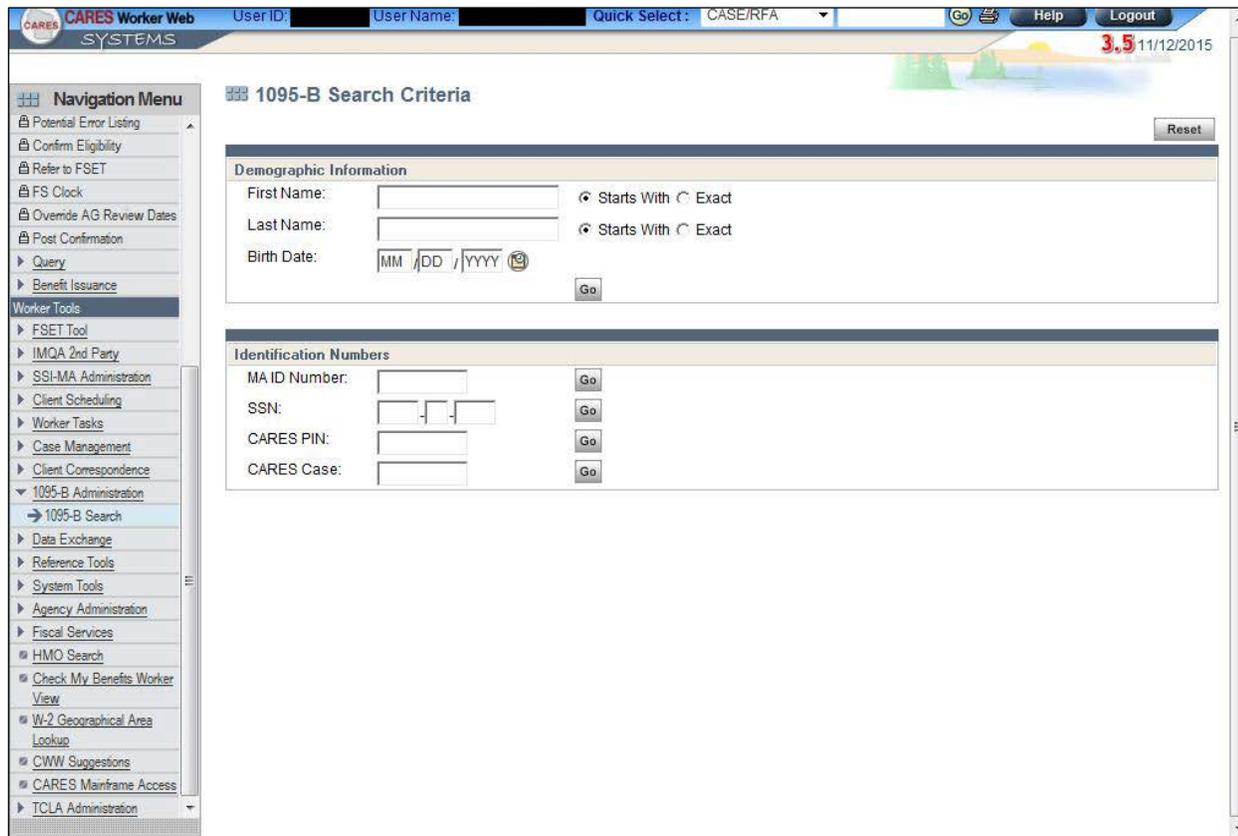


Figure 2 1095-B Search Criteria Page

After entering search criteria, matches will appear on the 1095-B Search Results page.

If no member records were found, no results will appear. If no records are found for a member, it means that CARES did not receive a record of MEC eligibility from interChange for the member. If the user is searching for someone who was expecting to receive a form, the user will need to complete additional research to determine if the member was eligible for MEC for the requested tax year and whether a 1095-B form needs to be created. For more information on creating a 1095-B form, see the operations memo section titled "Creating a 1095-B form."

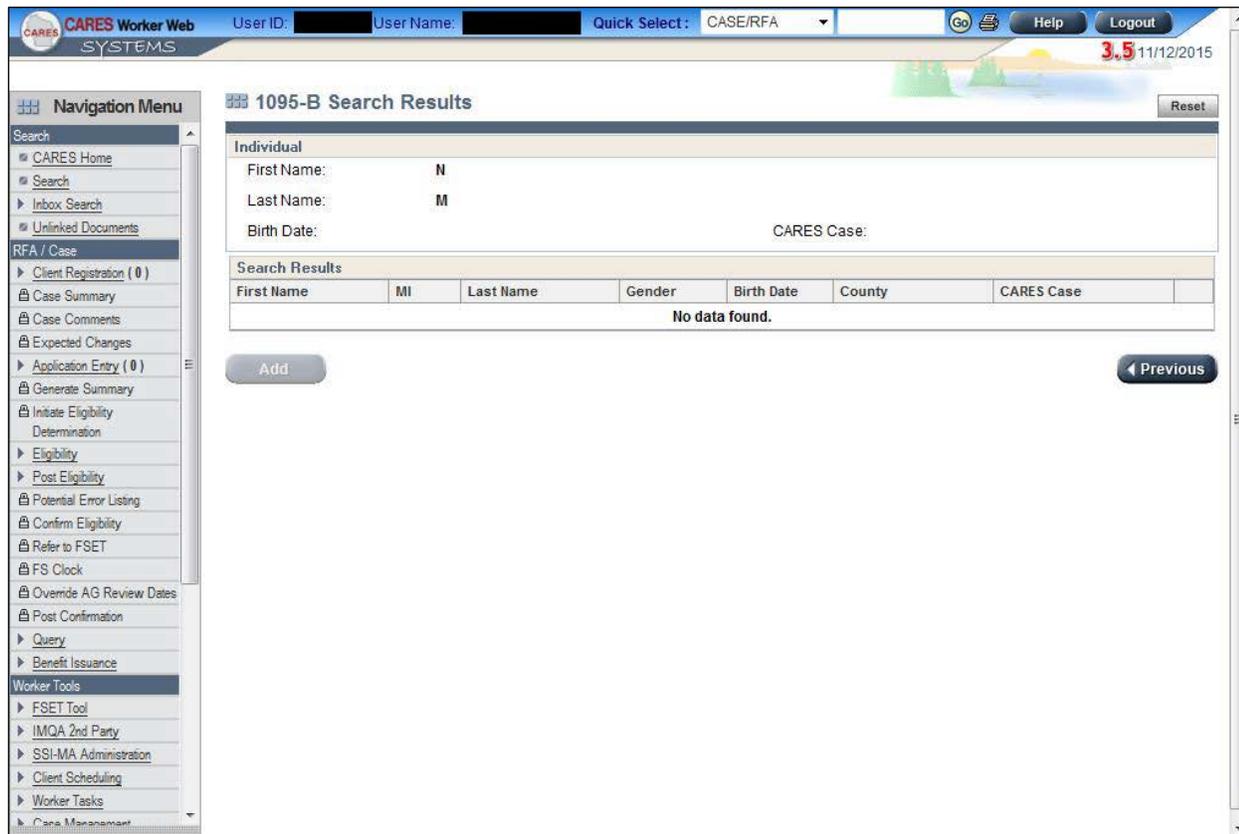


Figure 3 1095-B Search Results Page with No Results

If multiple matches appear, the user can sort using the column headers: First Name, Last Name, Gender, Birth Date, and County. The search results page will display up to 25 results on the page and up to 250 records per search. If more than 25 results are returned, the worker can use the page navigation to navigate the results. Click on the magnifying glass next to the member's record to get to 1095-B Information Page for that member.

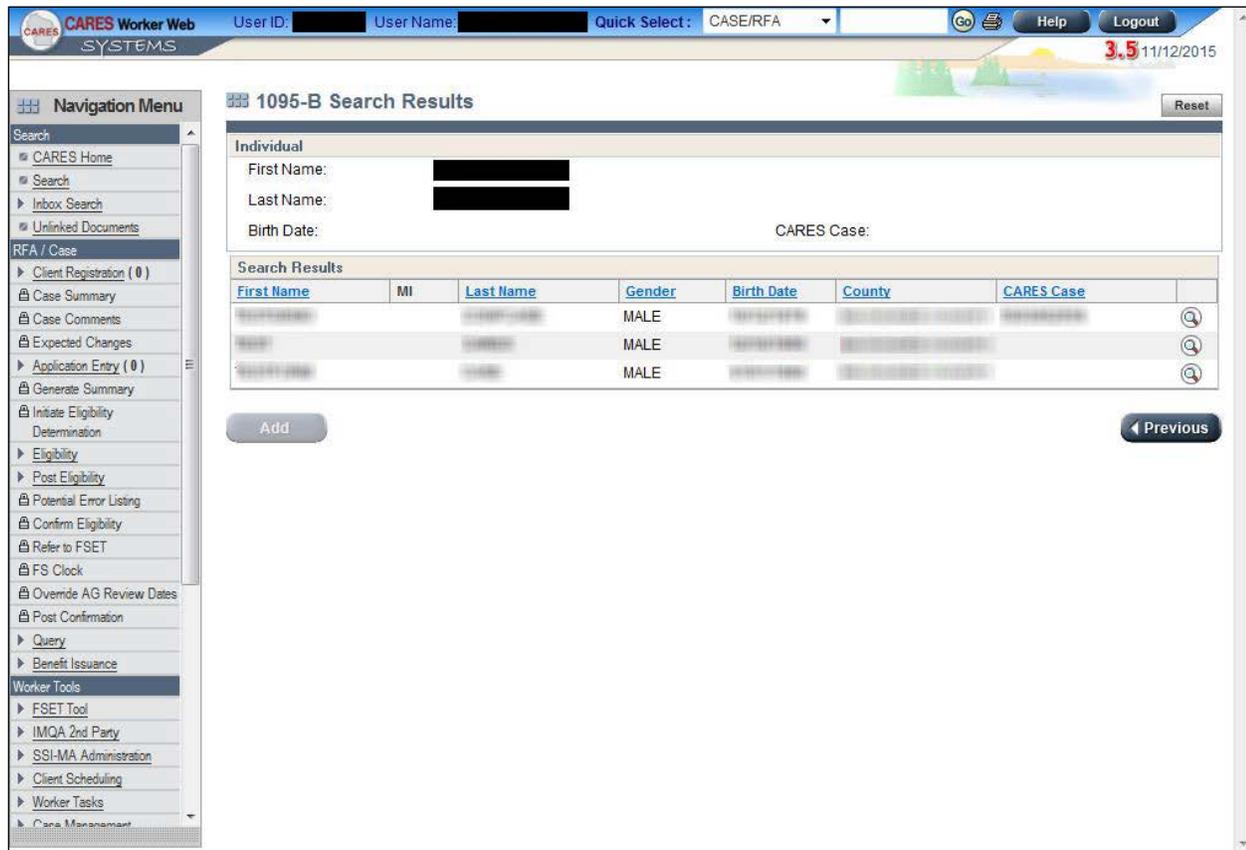


Figure 4 1095-B Search Results Page with Multiple Results

If the search criteria yields only one match, CWW will not display the 1095-B Search results page. Instead, CWW will show the 1095-B Information page for the member.

THE 1095-B INFORMATION PAGE

The 1095-B Information page includes the same information on the printed 1095-B form for the tax year. In addition to the information on the 1095-B form, the page also includes the CARES case number and PIN number, a Foster Care Indicator, and the correspondence history for the most recently mailed non-duplicate form.

From this page, users can update mailing addresses and send duplicate 1095-B forms. Only IM workers, leads, and supervisors will have the ability to create or update demographic information and MEC information on the 1095-B form from this page.

Note: While IM workers, leads, and supervisors can change demographic and MEC information from the 1095-B Information page, it does not change address, demographic information or confirm months of eligibility in CWW. Users who are updating demographics or MEC information must update the information on the CWW case and confirm eligibility. Once eligibility has been confirmed in CWW, the weekly batch process will determine if there were any changes to the MEC information on file in interChange and send a corrected 1095-B form. Changes to demographic information only do not generate a new 1095-B form.

1095-B Information Cancel Reset

1095-B Details

Form Details

* Tax Year: 2015 * Form Type: Initial
 Most Recent Date Form Sent to Member: 01/13/2016 Date Form Filed with IRS: 03/26/2016
 Last Updated: 01/09/2016 Updated By: [REDACTED]

Individual Information

* First Name: MI * Last Name: [REDACTED] Suffix: I [REDACTED] * Birth Date: [REDACTED]
 SSN: [REDACTED] * Gender: MALE MA ID: [REDACTED] CARES PIN: [REDACTED] CARES Case: [REDACTED]

Additional Information

* County / Tribe: [REDACTED] * Language: E - ENGLISH * Foster Care: No

Mailing Address Information

Address Line 1: [REDACTED]
 * Address Line 2: [REDACTED]
 Address Line 3: [REDACTED]
 * City: [REDACTED] * State: WI - WISCONSIN
 * ZIP: [REDACTED] Contact Phone: [REDACTED]

Minimum Essential Coverage (MEC)

* Covered for all 12 months: No Override Reason: [REDACTED]

Months of Coverage (if Covered for all 12 months is No):

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Yes	No										

Comments

Comment: [REDACTED]
 Current Size = 0 characters (1000 characters max.)

Most Recent Mailing Information

Most Recent Form for the Tax Year

Mailing Date	Description	Tax Year	Language	Send Duplicate	View
01/13/2016	1095-B Health Coverage - Initial	2015	ENGLISH	[REDACTED]	[REDACTED]

Preview 1095-B Correspondence

Description	Request Date	Request Time	Duplicate	Preview
No data found.				

Navigation: Tax Year: [REDACTED] Updated on or before: [REDACTED] Go [REDACTED] [REDACTED]

Cancel Previous Next

Figure 5 1095-B Information Page

To navigate between different tax years, use the page navigation buttons on the bottom of the page. Keep in mind that 1095-B forms will only be available starting with the 2015 tax year.

Form Details Section

This section will contain details about the most recent 1095-B form for the tax year and when it was filed with the IRS. It will also display whether the form is an initial or corrected form and the worker who last updated the form. If the 1095-B form was created by the batch process between interChange and CARES, the worker ID will display as "CARES."

Individual Information Section

This section will contain the member's demographic information and their identification numbers. Clicking the magnifying glass next to the SSN, MA ID, or CARES PIN will take the user to the Correspondence Search History page, where the user can look up past 1095-B forms or other correspondence.

Additional Information Section and Foster Care Indicator

Under the "Additional Information" section, there is a Foster Care indicator. If the Foster Care indicator on the 1095-B Information page is marked as "Yes," it means the member was enrolled in Foster Care Medicaid for at least one day during the year. Foster Care Medicaid is considered MEC. This indicator is meant to alert the users to proceed with caution when using the 1095-B Information page. Users may need to take extra precaution in verifying the identity of anyone requesting a 1095-B form for someone with a Foster Care indicator of "Yes" because the 1095-B form may contain the address of the child's foster care placement, which should not be shared without authorization.

Mailing Address Information Section

This section will list the mailing address or the address of the Medicaid payee for the member and the member's contact information. All users will be able to update the mailing address section.

Minimum Essential Coverage (MEC) Section

This section will contain information about the member's MEC for the tax year. There are two different indicators that show MEC coverage:

- If the member was enrolled in MEC for all twelve months of the year, the Covered for all 12 Months indicator will state "Yes"
- If the member was only enrolled in MEC for certain months of the year, each individual month will either state "Yes" or "No" depending on the months the member was eligible.

This section also includes an Override Reason Code. If the MEC months were modified, the user must enter an override reason code. Only users with access to change or create MEC information and will be entering Override Reason Codes. Users must enter case comments when using override codes.

Override Reason Code	When to Use this Reason Code
Incorrect Eligibility in interChange	Use this reason code if the MEC information between CARES and interChange did not match and a 1095-B form had to be created or corrected.
Fair Hearing Ruling	Use this reason code if months of MEC changed because of a decision from a fair hearing.
Other	Use this reason code if the previous two reason codes were not sufficient. The user must enter comments on the page if this reason code is used.

Most Recent Mailing Information Section

This section lists the most recently mailed initial or corrected 1095-B form for the tax year. The user can also view the 1095-B form that was sent to the member or send duplicate 1095-B forms. Duplicates that have been previously mailed will not be listed. The user will need to check the Correspondence Search History for duplicates that have been previously mailed.

If the member has received more than one corrected 1095-B form, only the most recent form will be shown. Users with access to Client Correspondence will be able to view any 1095-B forms that were previously sent to the member.

Preview 1095-B Correspondence

This section will contain details about the most recent 1095-B form that was requested to be mailed and has not yet been processed in CARES for the tax year and mailed. The user can preview the requested 1095-B form from this section.

Confidential Cases

If the member belongs to an open or closed confidential case in CARES and the user does not have access to the case, a blank read-only page will be displayed with a message indicating that the case is confidential. Access to confidential 1095-B forms follows the same rules as confidential CARES cases. Only the primary worker or the primary worker's supervisor will have access to see the information on the 1095-B Information page.

CARES Worker Web User ID: XCTB4H User Name: E RODRIGUES Quick Select: CASE/RFA 3.5 11/12/2017

Navigation Menu

- Search
 - CARES Home
 - Search
 - Inbox Search
 - Unlinked Documents
- RFA / Case
 - Client Registration (0)
 - Case Summary
 - Case Comments
 - Expected Changes
 - Application Entry (0)
 - Generate Summary
 - Initiate Eligibility Determination
 - Eligibility
 - Post Eligibility
 - Potential Error Listing
 - Confirm Eligibility
 - Refer to FSET
 - FS Clock
 - Override AG Review Dates
 - Post Confirmation
 - Query
 - Benefit Issuance
- Worker Tools
 - FSET Tool
 - IMQA 2nd Party
 - SSI-MA Administration
 - Client Scheduling
 - Worker Tasks
 - Case Management

1095-B Information Cancel [] Reset

The following events have occurred:

WT157: Individual belongs to a confidential case in CARES. You do not have access to the case. Only the staff persons in the income maintenance agency who have access to the confidential case in CARES have access to this individual's 1095-B information.

1095-B Details

Form Details

* Tax Year: Most Recent Date Form Sent to Member: Last Updated:

* Form Type: Date Form Filed with IRS: Updated By:

Individual Information

* First Name MI * Last Name Suffix * Birth Date

SSN * Gender MA ID CARES PIN CARES Case

Additional Information

* County / Tribe: * Language: * Foster Care:

Mailing Address Information

Address Line 1:

* Address Line 2:

Address Line 3:

* City: * State:

* ZIP: - Contact Phone:

Minimum Essential Coverage (MEC)

* Covered for all 12 months: Override Reason:

Months of Coverage (if Covered for all 12 months is No):

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Comments

Comment:

Current Size = 0 characters (1000 characters max.)

Most Recent Mailing Information

Most Recent Form for the Tax Year

Mailing Date	Description	Tax Year	Language	Send Duplicate	View
No data found.					

Preview 1095-B Correspondence

Description	Request Date	Request Time	Duplicate	Preview
No data found.				

Tax Year: [YYYY] Updated on or before: [MM / DD / YYYY] Go

Cancel [] Previous Next

Figure 6 1095-B Information Page for Confidential CARES Cases

SENDING DUPLICATE 1095-B FORMS

A member can request a duplicate 1095-B form anytime during the year. From the 1095-B Information page, users can send duplicates to the same mailing address, a new mailing address, or if requested, directly to a tax preparer.

Sending a Duplicate to the Same Address

If the member does not need to update the mailing address, the user can send a duplicate 1095-B form by clicking the Send Duplicate icon in the section, Most Recent Form for the Tax Year. Once the user has sent a duplicate, the page will reload and an entry will appear under the Preview 1095-B Correspondence section.

Most Recent Mailing Information					
Most Recent Form for the Tax Year					
Mailing Date	Description	Tax Year	Language	Send Duplicate	View
01/13/2017	1095-B Health Coverage - Initial	2016	ENGLISH		

Preview 1095-B Correspondence					
Description	Request Date	Request Time	Duplicate	Preview	
1095-B Health Coverage - Initial	11/17/2017	15:24:49	Yes		

Cancel

Figure 7 Most Recent Mailing Information

If the member does request a duplicate 1095-B form be sent to a new mailing address or sent directly to a tax preparer, the user should update the mailing address information on the 1095-B Information page. After entering the new address and clicking the “Send Duplicate” icon, the user will need to complete address validation.

Note: Address updates in the 1095-B Administration Tool do not update addresses on the CARES case. To send the 1095-B form to a different address, the user only needs to update the address on the 1095-B Information page. However, if the member is reporting a residential or mailing address change, an IM worker must update the address on the case in CWW and must also update the address the 1095-B Information page to send a 1095-B form to the new address.

The screenshot displays the '1095-B Information' page in the CARES Worker Web system. The interface includes a navigation menu on the left and a main content area with several sections:

- Form Details:** Shows Tax Year (2015), Form Type (Initial), Most Recent Date Form Sent to Member (01/13/2016), Date Form Filed with IRS (03/26/2016), Last Updated (01/09/2016), and Updated By.
- Individual Information:** Includes fields for First Name, Last Name, Suffix, Birth Date, SSN, Gender, MA ID, CARES PIN, and CARES Case.
- Additional Information:** Shows County/Tribe, Language (E - ENGLISH), and Foster Care status (No).
- Mailing Address Information:** Contains input fields for Address Line 1, 2, and 3, City, State (WI - WISCONSIN), ZIP, and Contact Phone. A red arrow points to the Address Line 2 field with the text "Enter mailing address".
- Minimum Essential Coverage (MEC):** A table for tracking coverage for all 12 months, with columns for each month (Jan-Dec) and rows for Yes/No.
- Comments:** A text area for entering comments, currently empty.
- Most Recent Mailing Information:** A table showing the most recent form for the tax year.
- Preview 1095-B Correspondence:** A table for viewing correspondence, currently showing "No data found."

At the bottom of the page, there is a search bar with fields for Tax Year (YYYY) and Updated on or before (MM/DD/YYYY), along with navigation buttons for Previous and Next.

Figure 8 Entering an Address on the 1095-B Information Page

ADDRESS VALIDATION IN THE 1095-B ADMINISTRATION TOOL

Newly entered mailing address will need to be validated with the Finalist Validation Service, similarly to how addresses are validated when entered or updated on a CARES case. After entering the address, clicking on the “Next,” “Previous,” or “Send Duplicate” icon, will take the user to the 1095-B Address Verification page.

Note: When entering addresses on the 1095-B Information page, make sure to enter the street address on Address Line 2. Address line 1 is reserved specifically for address overflow such as apartment numbers or “care of” or “C/O” information. If no information is entered on Address Line 2, the user will be prompted to enter information on Address Line 2.

The 1095-B Address Verification page will display both the user entered address as well as the Post Office Suggested Address and provides three options to the user:

1. **Accept the Post Office Suggested Address** – The user should select this option to choose the address returned by the post office. This address may be slightly different from the mailing address reported by the member.
2. **Override the Post Office Suggested Address** – The user should select this option to choose the mailing address as reported by the member. In some cases, the user address may be more correct than what is available through the Finalist service.
3. **Edit the address and Resubmit Original Address** – If the user has modified the address on the 1095-B Address Verification page, this option will allow the user to re-send the modified address to the Finalist Validation Service. It will reload the page again with the updated information.

As a best practice, users should always confirm the correct mailing address with the member if possible before selecting an option. Once the user has selected an option, clicking “Next” will load the 1095-B Information page with the selected address.

1095-B Address Verification

The following events have occurred:

- WT004: Address Line 2 can be updated.
- WT006: Zip +4 has been added.

Mailing Address Information

Address Line 1:

* Address Line 2:

Address Line 3:

* City: * State:

* ZIP: -

Post Office Suggested Address

Address Line 1:

Address Line 2:

Address Line 3:

City: State:

ZIP: -

What Would You Like To Do

Accept Post Office Suggested Address - Use the address listed in the 'Post Office Suggested Address' section when there are no error messages displayed.

Override Post Office Suggested Address - Keep address listed in 'Mailing Address Information' section.

Resubmit Original Address - After making changes, re-verify the modified address with the Address Verification web service.

Next

Figure 9 1095-B Address Verification Page

CHANGING A 1095-B FORM

Only IM workers, leads, and supervisors can change information other than the 1095-B mailing address on a 1095-B form. As stated earlier, users who are changing demographics, residential address, or MEC information should update the information on the CWW case and confirm eligibility. If MEC information has been changed in CARES, a corrected 1095-B form will be mailed directly to the member through the weekly batch process. Address-only or demographic-only related changes do not trigger a new 1095-B form to be mailed. A user should only use the 1095-B Information page to update MEC information if the individual needs a copy to be mailed immediately prior to being sent with the weekly batch process, or if the individual specifically requests a new 1095-B with updated demographic information.

Changing MEC information on the 1095-B Information page will trigger a corrected 1095-B form to be filed with IRS and mailed to the member. If Individual Information or MEC Information needs to be updated on a 1095-B form, navigate to the member's 1095-B Information page for the requested tax year. Click on the "add" button at the bottom of the page to load a new 1095-B Information page.

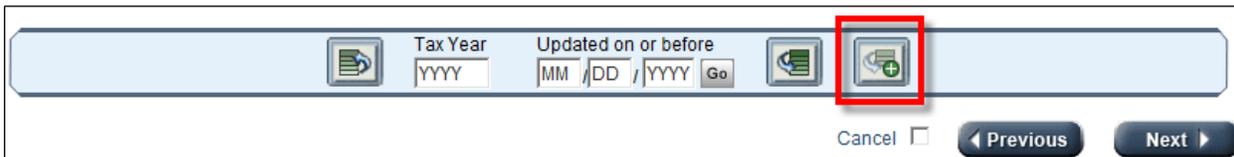


Figure 10 Adding a New 1095-B Form for a Requested Tax Year

The 1095-B information page will load with saved information in the Individual Information section and the mailing address section but these fields will now be unlocked for editing. The read-only fields on the page will be the MA ID number, CARES PIN, and CARES case number. Make sure to select the correct tax year and mark the form type as "Corrected" since the user is changing the 1095-B form. After updating information on the page, the user will have to complete address validation. Once address validation is completed, the 1095-B Information page will load with the updated information. CARES will automatically trigger a new 1095-B form to be filed with the IRS and mailed to the member.

1095-B Information Cancel Reset

1095-B Details

Form Details

* Tax Year: * Form Type:
 Most Recent Date Form Sent to Member: Date Form Filed with IRS:
 Last Updated: Updated By:

Individual Information

* First Name MI * Last Name Suffix * Birth Date
 SSN * Gender MA ID CARES PIN CARES Case

Additional Information

* County / Tribe: * Language: E - ENGLISH * Foster Care: No

Mailing Address Information

Address Line 1:
 * Address Line 2:
 Address Line 3:
 * City: * State: WI - WISCONSIN
 * ZIP: Contact Phone:

Minimum Essential Coverage (MEC)

* Covered for all 12 months: Override Reason:
 Months of Coverage (if Covered for all 12 months is No):
 Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Comments

Comment:
 Current Size = 0 characters (1000 characters max.)

Most Recent Mailing Information

Most Recent Form for the Tax Year					
Mailing Date	Description	Tax Year	Language	Send Duplicate	View
No data found.					

Preview 1095-B Correspondence

Description	Request Date	Request Time	Duplicate	Preview
No data found.				

Tax Year: Updated on or before:

Figure 11 Changing a 1095-B Form for a Tax Year

CREATING A 1095-B FORM

Only IM workers, leads, and supervisors can create a 1095-B form. Situations where the 1095-B form needs to be created should be rare and will most likely occur if CARES or interChange were unable to process the member's information to create a new form.

New 1095-B forms will be filed electronically with the IRS and mailed to the member. When a new form is needed, the user should make sure to check both CARES and interChange to verify MEC eligibility and make updates to the case in CWW and confirm eligibility when necessary. Once eligibility has been confirmed, a new 1095-B form will be sent with the weekly batch process and the worker should not create a new form using the 1095-B tool.

If the member was not enrolled in an MEC plan, no 1095-B form should be created. If the user has determined that the member should have received a 1095-B form, make sure the eligibility in CARES and the eligibility in interChange are the same. If the months of eligibility are not the same, the IM worker, lead, or supervisor will need to run eligibility and confirm in CARES to send the correct eligibility information to interChange. This may include running and confirming eligibility with dates or completing a manual certification. If the months of eligibility are the same, and no 1095-B form is found for the member, then the worker should create a new form using the 1095-B tool.

Creating a 1095-B for a Member with no Previous 1095-B Record

When the worker is unable to find a matching 1095-B search result, click the “Add” button on the bottom of 1095-B Search Results page.

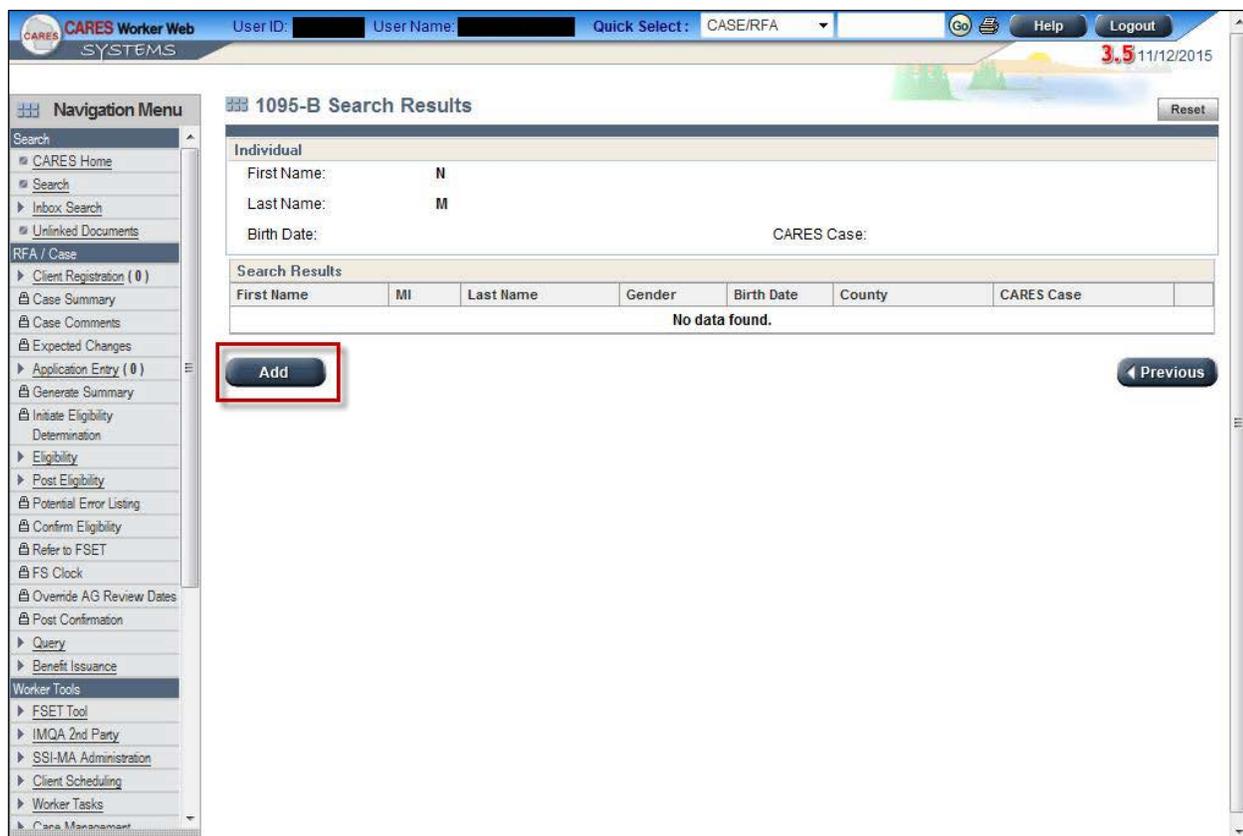


Figure 12 Creating a New 1095-B Form

A blank 1095-B Information page will appear. The user will need to enter all of the member’s information on the page. Make sure to select the correct tax year and mark the form type as “initial” since the user is creating brand new 1095-B form. When completed, click “Next.” The user will need to complete both address validation and individual clearance before the 1095-B form is created. Once

these steps are completed, CARES will automatically trigger a 1095-B form to be filed with IRS and mailed to the member.

The screenshot shows the '1095-B Information' page in the CARES Worker Web. The page is divided into several sections for data entry:

- 1095-B Details:** Includes 'Form Details' with fields for Tax Year, Form Type, Most Recent Date Form Sent to Member, Date Form Filed with IRS, Last Updated, and Updated By.
- Individual Information:** Includes fields for First Name, MI, Last Name, Suffix, Birth Date, SSN, Gender, MA ID, CARES PIN, and CARES Case.
- Additional Information:** Includes fields for County / Tribe, Language, and Foster Care.
- Mailing Address Information:** Includes fields for Address Line 1, 2, and 3, City, State, ZIP, and Contact Phone.
- Minimum Essential Coverage (MEC):** Includes a dropdown for 'Covered for all 12 months', an 'Override Reason' dropdown, and a grid for 'Months of Coverage' (Jan-Dec).
- Comments:** A large text area for entering comments, with a character count of 0/1000.

At the bottom of the page, there are two tables:

Most Recent Mailing Information				
Most Recent Form for the Tax Year				
Mailing Date	Description	Tax Year	Language	Send Duplicate / View
No data found.				

Preview 1095-B Correspondence				
Description	Request Date	Request Time	Duplicate	Preview
No data found.				

Below the tables is a navigation bar with a 'Tax Year' dropdown, an 'Updated on or before' date field, and 'Go', 'Previous', and 'Next' buttons.

Figure 13 Blank 1095-B Information page for a Member with No Previous 1095-B Record

COMPLETING INDIVIDUAL LEVEL CLEARANCE IN THE 1095-B ADMINISTRATION TOOL

When creating a brand new 1095-B form for a member with no previous 1095-B record for any tax year, the IM worker, lead, or supervisor must complete individual level clearance to match the member with

the Master Customer Index (MCI) database. After completing address validation on the 1095-B Address Verification page, the 1095-B Individual Clearance page will appear with the best MCI matches (75 percent or higher match) based on the demographic information entered on the 1095-B Information page. Individual clearance in the 1095-B Administration Tools works exactly like individual clearance on a CARES case.

The MCI matches will be displayed as list on the 1095-B Individual Clearance page. The IM worker, lead, or supervisor will have an option to select one of the matches or create a new individual if the match is 75 percent or higher and less than 97 percent.

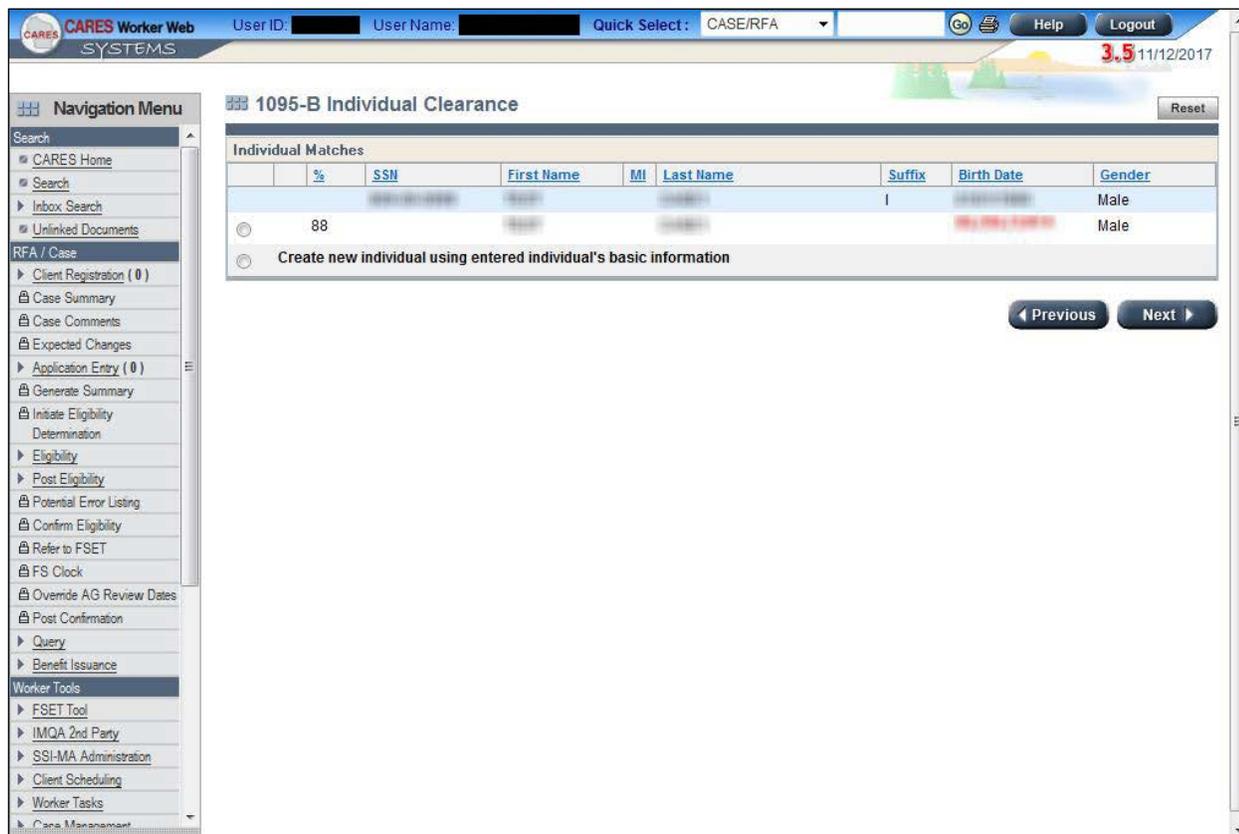


Figure 14 MCI Matches Between 75 Percent and 97 Percent

If the match is 97 percent or higher, the IM worker, lead, or supervisor will have to select one of the matching individuals listed and will not be able to create a new individual.

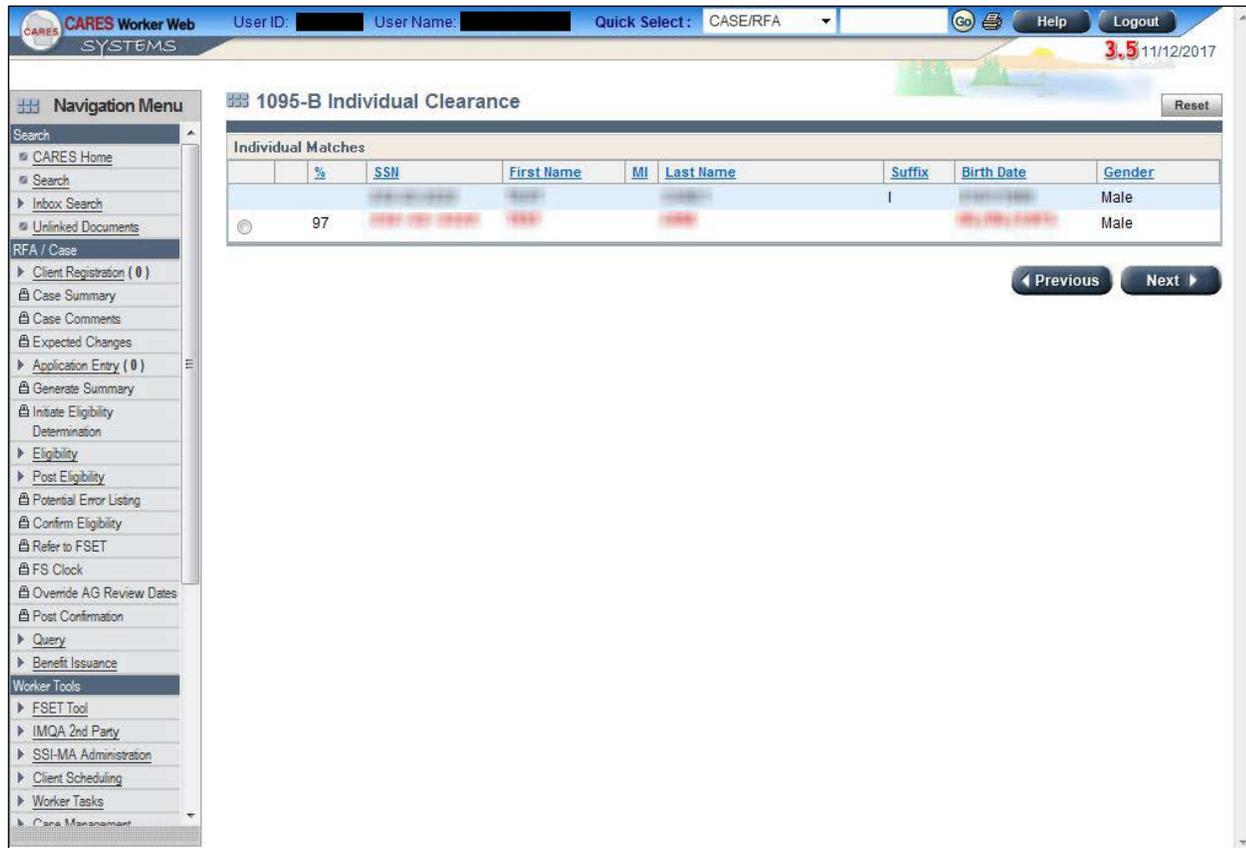


Figure 15 MCI Matches Greater Than 97 Percent

After making a selection and clicking “Next,” the IM worker, lead, or supervisor will return to the 1095-B Information page. When the page loads, if the individual was previously known to CARES, then CARES will check to see if a 1095-B form already exists for any tax year based on the member’s PIN. If a previous 1095-B record does exist, the IM worker, lead, or supervisor will see an error message and will be unable to add a 1095-B form. Instead, the worker should view the existing record and make corrections as needed. If no previous record exists, the 1095-B Information page will display the demographic information returned by MCI.

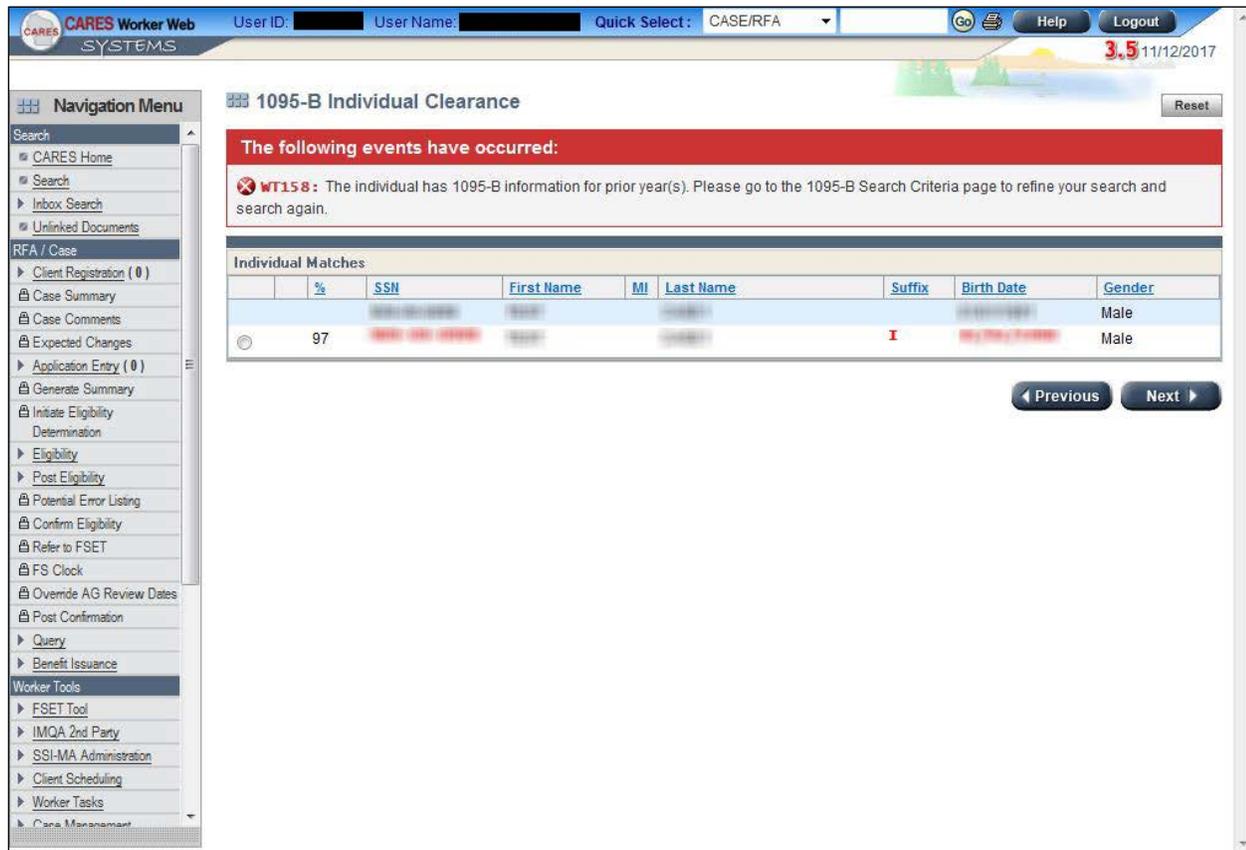


Figure 16 1095-B Individual Clearance Error Message for Members Who Already Have a 1095-B Record

ACCESS

1095-B forms will not be available online through ACCESS at this time. A link to the [DHS 1095-B information web page](#) has been added to the left navigation menu in ACCESS to provide members more information about the 1095-B form when logged into a MyACCESS account. No other changes to ACCESS have been made for the 1095-B form.

! ** THIS WEBSITE SHOULD ONLY BE USED FOR TESTING AND TRAINING **



ACCESS

Your Connection to Programs for Health, Nutrition and Child Care

Hello, Anna | [Logout](#) | [Español](#) | [Home](#)

Print **Help**

MyACCESS

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- [View My Letters](#)
- [Manage My Letters](#)
- My Health Care
- [Request Explanation of Medical Benefits \(EOMB\)](#)
- Get a New Card
- [ForwardHealth Card](#)
- My Account
- [Manage My Account](#)
- My Benefits
- [Report My Changes](#)
- [Apply For Benefits](#)
- [Renew My Benefits](#)
- Learn More
- [Other Programs](#)
- [IRS 1095-B Tax Information](#)

My Benefits

This information is current as of Thursday October 1, 2015.

Benefits	Status	Details
 FoodShare	██████ and ██████ are not getting FoodShare benefits in October 2015.	
 BadgerCare Plus Standard Plan	In October 2015, ██████ and ██████ are getting BadgerCare Plus Standard Plan benefits.	

ACCESS does not have any information about W-2 benefits at this time.

My Applications

Who	Benefits	Status	Details
██████	Health Care	Submitted	Next Steps 
██████	Health Care	Not Submitted	Continue 

Figure 17 MyACCESS Navigation Menu

CONTACTS

BEPS CARES Information and Problem Resolution Center

DHS/DHCAA/BEPS/PJH