



IRS 1095-B Form

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Agenda

- Background
- Important dates
- Key considerations
- Who will receive a form?
- 1095-B admin tool in CARES Worker Web (CWW)
- Expectations for agencies
- Resources
- Questions



Acronyms

- Centralized Document Processing Unit (CDPU)
- Client Assistance for Re-employment and Economic Support (CARES)
- CARES Worker Web (CWW)
- Income Maintenance (IM)
- interChange (iC)
- Internal Revenue Service (IRS)
- Minimum essential coverage (MEC)
- Children's Health Insurance Program (CHIP)



Background

- Starting with tax year 2015, states are required to send IRS 1095-B forms with information on all individuals who were enrolled in a Medicaid or CHIP plan that meets MEC criteria at any time in 2015.
- IRS 1095-B forms are used by tax filers to answer a question about MEC when filling out their tax return.



Background

- Members do not have to send a copy of the 1095-B form to the IRS.
- The state will send information reported on the IRS 1095-B form directly to the IRS.
- Members who do not file taxes or are not being claimed as someone's tax dependent can disregard the form.



Important Dates

- **January 13 – 31, 2016:** DHS is sending out forms via postal mail to members who had MEC.
- **January 31, 2016:** Deadline for mailing 1095-B forms to members for tax year 2015.
- **March 31, 2016:** Deadline for DHS to send the forms electronically to the IRS.



Key Considerations

- States are required to meet the deadlines set by IRS.
- An estimated 1.28 million members will receive an initial form and cover letter in January.
- The 1095-B form must include all MEC, not just the MEC established in CARES.
- iC will be the source of 1095-B data
- Wisconsin has opted for a one-form-per-member approach.



Who will receive a form?

- Any member who was enrolled for at least one day in 2015 in a Medicaid or CHIP plan that is considered MEC will receive a form.
 - The form will indicate the months in 2015 in which the person had MEC or if the person had MEC for all 12 months of the year.



What is not considered MEC?

- MEC includes* most full benefit plans with the following exceptions:

- Met deductibles
- Prenatal Program for non-qualifying immigrants

*CMS is reviewing MEC definition. Final information about MEC and non-MEC programs will be provided at a later date.

- MEC does not include limited benefit plans, such as Family Planning Only Services and Emergency Services.



Cover Letter Information

- The cover letter will direct members to a dedicated phone line for Wisconsin 1095-B Form Assistance.
- IM agencies and Member Services will also provide 1095-B customer service.
- No IM agency information will be included on the cover letter or form.



Cover Letter Information

- The form will be mailed to the individual's most recent address in iC.
- Addresses will not be reconciled against CARES.
- The envelope will say "Important tax information."
- Undeliverable forms will be returned to the CDPU, counted, and shredded.



Cover Letter and 1095-B Form

Refer to the 1095-B supplemental handout for draft examples of the 1095-B cover letter and the 1095-B form.



CWW 1095-B Admin Tool

- On January 9, 2016, the 1095-B Admin Tool will be added to CWW.
- Refer to the 1095-B supplemental handout for a draft screenshot of the 1095-B Information page in the CWW 1095-B Admin Tool.



CWW 1095-B Admin Tool

- The 1095-B tool is part of CARES, but the data elements are not linked to pages in CARES.
 - Workers will use 1095-B search pages to find individuals but will not be able to link directly to 1095-B from the person's case.
 - If workers make changes to addresses, MEC, or demographics, they need to assess whether the same changes need to be made to the case.



Customer Service

- Two levels of customer service:
 - Level 1: Answering basic questions about the 1095-B form, updating the 1095-B mailing address, sending a duplicate form.
 - Level 2: All of the functions of Level 1 plus the authority to make corrections to demographic or MEC information on an existing form and create a new 1095-B form, if needed.



Customer Service

- Level 1 service: The Wisconsin 1095-B Form Assistance staff and staff with the IM Receptionist profile.
- Level 2 service: IM workers, IM supervisors, and HP Eligibility staff.
- IM, 1095-B Form Assistance, and Member Services are not expected to answer questions about using the form to file taxes.



Contact with IM Agencies

- Although members will be directed to Wisconsin 1095-B Form Assistance, members may reach out to IM agencies.
- Wisconsin 1095-B Form Assistance may refer members to IM agencies if the member has an eligibility-related question.



Expectations for IM Agencies

- Use the new 1095-B Admin tool in CWW to:
 - Issue duplicate forms
 - Issue corrected forms
 - In rare situations, create a new form if someone should have received a form but did not
- Answer questions about months of MEC and receipt of the 1095-B form.
- Give/print a paper copy if requested in person.



Duplicate and Corrected Forms

- After the initial mailing, members may receive duplicate or corrected forms.
- Duplicate forms can be sent from the CWW 1095-B Admin Tool.
- The CWW 1095-B Admin Tool can be used to send the duplicate to a different address.



Duplicate and Corrected Forms

- Occasionally, a worker may need to make a manual correction to the form if the system doesn't pick up a correction or the member needs the corrected form right away.
- If a worker does make a manual correction to the 1095-B form, the worker must make sure to also update the CARES case and/or correct eligibility in iC, if needed.



Expected Call Volume

- DHS is planning for substantial call volume, particularly in February and April.
- DHS is providing a call script to help answer questions about the 1095-B form.
- DHS is also working on a short message about the 1095-B form for CCA.



Resources for agencies

- IMAC IT presentation:
December 4, 2015
- Operations Memo:
December 4, 2015 (target date)
- Updates to the BadgerCare Plus training materials:
December 2015 (target date)
- Call scripts:
Early January 2015 (target date)



Next Steps

Agencies should begin preparing for January.

Considerations:

- Supporting the volume of calls from members with questions and requests.
- Preparing call centers to answer 1095-B questions.



Questions about 1095-B?

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