



COLORADO

Department of Health Care  
Policy & Financing

# For County Partners: Form 1095-B Frequently Asked Questions

*February 19, 2016*

For general information, please see the IRS Form 1095-B introductory [one-pager](#) and [webinar](#), the cover letters for new 1095-B forms available in [English](#) and [Spanish](#), and other resources posted on the [Eligibility Partner FAQs & Trainings](#) page on [Colorado.gov/HCPF](#) in the IRS Form 1095-B folder. This frequently asked questions document is intended to supplement existing materials with answers to questions that the Department has received from counties.

## **I see IRS Form 1095-B in the CBMS print queue, can I go ahead and print it locally?**

Please wait to print the 1095-B forms locally until they are processed by batch and moved to printed details (History). The forms will be printed in Batch Mode. You can go ahead and view the forms at any time, but if you print the form before it is processed by batch, it will go into History and will have to be re-run to populate again.

## **It sounds like counties may get a number of questions from Medicaid and CHP+ members about these forms, how do we know what to tell them?**

For answers to frequently asked questions from members, visit [COHealthInfo.com/IRSForm1095B](#).

## **Who is the responsible individual?**

The responsible individual is the Head of Household for the case in CBMS. The responsible individual may also be a covered individual, but does not have to be.

[See the 1095-B Desk Reference.](#)

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## Who is the covered individual?

The covered individual is a person who was enrolled in Colorado Medicaid or CHP+ for at least one day in 2015. The covered individual may also be a responsible individual on a 1095-B form, but does not have to be.

[See the 1095-B Desk Reference.](#)

## Where will returned mail for Form 1095-B go?

Similar to other correspondence coming out of CBMS, the return address will be the eligibility site where the case is assigned.

Mail returned as undeliverable will be sent to the eligibility site listed as the return address.

## What do county offices need to do with returned 1095-B forms?

Counties should follow their existing process for handling returned member correspondence. Federal tax information safeguards do not apply to the 1095-B mailings. This mailing should be treated like all other correspondence sent from CBMS. There are no new requirements for handling returned 1095-B forms.

## Some members are mailing their accurate 1095-B form(s) back to the county or eligibility site where the case is assigned. What should we do with forms members mail to us?

There is no requirement for what eligibility sites need to do with 1095-B forms that members mail to them. Some counties have elected to mail the form back to the member. If an eligibility site chooses to mail this form back to the member, the Department has developed a [sample cover letter](#) they can choose to send with the 1095-B form. This letter is available on the in the [Eligibility Partner's FAQs and Trainings](#) in the 1095-B folder.

## Will there be anything on the envelope to distinguish 1095-B forms from other correspondence?

No. The envelopes for IRS Form 1095-B are the same as those used for other correspondence from CBMS. When counties receive returned 1095-B forms, they should

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follow their existing process for returned mail.

## What do members need to do with their 1095-B forms?

Members should keep IRS Form 1095-B with their other tax documents for their records. If they file federal taxes, they should bring Form 1095-B with them when they file. Members do not need to wait to receive IRS Form 1095-B to file their federal taxes. If they receive a corrected 1095-B form after they file their taxes, they are NOT required to file an amended return.

## Can counties make changes to 1095-B forms?

County users cannot make changes directly to IRS Form 1095-B. Instead, you can update a case in CBMS as you currently do, and that will automatically update and generate a corrected form in CBMS.

## What is the role for county workers in correcting inaccurate information on 1095-B forms?

County workers should follow their existing process for making changes to cases in CBMS. IRS Form 1095-B is not creating any new processes in CBMS.

You can help members who contact you because they believe that information on their 1095-B form(s) is incorrect. While you cannot make changes to the form directly, if you follow your existing process to update fields in the case in CBMS, changes to the fields listed below will automatically generate a corrected 1095-B. The form will be batched and mailed to the member within 7-10 business days.

Fields in CBMS that when changed will generate a corrected 1095-B form:

- Months of Coverage (eligibility months)
- Name (Responsible Individual or Covered Individual)
- Social Security Number (Responsible Individual or Covered Individual)
- Date of Birth (DOB): DOB will only appear on a 1095-B form where there is no SSN for the covered individual

## When will CBMS generate corrected 1095-B forms?

On a weekly basis, CBMS will generate corrected 1095-B forms for changes or corrections to:

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- Months of Coverage (eligibility months)
- Name (Responsible Individual or Covered Individual)
- Social Security Number (Responsible Individual or Covered Individual)
- Date of Birth (DOB): DOB will only appear on a 1095-B form where there is no SSN for the covered individual

## What should a member do if there is a mistake on their 1095-B form?

If there is a mistake on their 1095-B form, members can call or visit their local county office of social/human services. For changes to name, address, or Social Security Number, they can go to their [Colorado.gov/PEAK](https://colorado.gov/PEAK) account. Click on "Manage My Account" and "Report My Changes," and enter the updated information.

Eligibility partners who do not have access to CBMS can refer members to call the Medicaid Customer Contact Center at 800-221-3943 or State Relay: 711.

## CBMS shows the member as having 12 months of coverage, but their 1095-B form does not have all of the months marked. What should I do?

1. Please remind the member that, if they file, they do not need this form to file taxes. Form 1095-B is for their records, and they should keep it with their other tax documents.
2. Check to see if they were on more than one case in CBMS in 2015. There will be a separate 1095-B form issued to the Head of Household in CBMS for each case for the months the person was on that case.
3. For Medicaid members, look at the Medicaid program the individual was enrolled in. As a reminder, individuals enrolled in QMB (F4), SLMB (F3), QI-1 (F2), QDWI (P3), OAP HCP-A (B0), OAP HCP-B (BA), LIS (L1), or temporary coverage through Presumptive Eligibility (K1, K2, K5, K7, PA), will not receive 1095-B from the Department for the months they were enrolled in ONLY that program. Read more about these programs [here](#).
4. If you follow these steps and are unable to identify why the months on the 1095-B form are different from the eligibility months in CBMS, please follow your



existing process to submit a Help Desk Ticket (HDT).

## **For members that received Form 1095-B but do not file taxes, what do they have to do with the form?**

Receiving IRS Form 1095-B does not mean that the member has to file taxes. Individuals that do not file taxes should keep this form for their records.

If an individual has questions about whether or not they need to file, they can go to [IRS.treasury.gov/freetaxprep](https://www.irs.treasury.gov/freetaxprep), or call 2-1-1 and ask to be connected with a local tax assistance site.

## **I was contacted by a member who has joint custody of her child. The child is on the other parent's Medicaid case. The member needs proof that her child had Medicaid in 2015, but the other parent won't give her a copy of the 1095-B. Can I print a copy of it and give it to the member who contacted me?**

Form 1095-B does not change privacy regulations, and you should follow your existing process for when you share information about another person's case. If the member wants a copy of the form, she would need to get that on her own from the other parent. However, keep in mind that members do not need Form 1095-B to file taxes. It is only for their records. If the member is going to file taxes claiming her child as a dependent, and she knows the months her child had health coverage, she can indicate that when she files.

## **In 2015, Billy was on his mother's Medicaid case from January to June, and on his grandmother's case from July through December. Both his mother and his grandmother received 1095-B forms for Billy. Why?**

If a person was on multiple cases in CBMS over the course of 2015, there will be a 1095-B form for that person for each case they were on. The form will be mailed to the Head of Household for that case in CBMS.

Billy's mother received a 1095-B form showing Billy's coverage for January through June, and his grandmother received a 1095-B form showing Billy's coverage for July through December.



## What should I do if I get questions about Form 1095-A: Health Insurance Marketplace Statement?

Consumers who were enrolled in private health insurance through Connect for Health Colorado in 2015 will receive IRS Form 1095-A. They can find a copy of their 1095-A form in the “My Documents” section of their Connect for Health Colorado online account. Individuals with questions about IRS Form 1095-A should visit the [Connect for Health 2015 tax information page](#). They can also call Connect for Health Colorado directly with questions at 855-PLANS-4-YOU (855-752-6749).

### For non-case specific information contact

[Medicaid.Eligibility@state.co.us](mailto:Medicaid.Eligibility@state.co.us)

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