



Tuesday, January 12, 2015
 9:00 a.m. – 10:00 a.m.
 Conference Call: (877) 960-6980
 Passcode: 2236381

Medi-Cal IRS MEC Reporting and Form 1095-B Returns Dispute Workgroup

Attendees:

California Department of Health Care Services	Volunteer/County	Email
<input type="checkbox"/> Linn Hom	<input type="checkbox"/> Assmaa Elayyat/CWDA	elayyat@cwda.org
<input type="checkbox"/> Linda Page	<input type="checkbox"/> Anita Cirillo/San Bernardino	acirillo@hss.sbcounty.gov
<input type="checkbox"/> Sharon Perry	<input type="checkbox"/> Luis Ontiveros/Los Angeles	LuisOntiveros@dpss.lacounty.gov
<input type="checkbox"/> Shalan Rahul	<input type="checkbox"/> Maria Santana/Orange	Maria.Santana@ssa.ocgov.com
<input type="checkbox"/> Leejuan Camarena	<input type="checkbox"/> Melissa Polanco/Orange	Melissa.Polanco@ssa.ocgov.com
<input type="checkbox"/> Joel Thomas	<input type="checkbox"/> Isabel Rodriguez/Stanslaus	Rodrigl@stancounty.com
<input type="checkbox"/> O'Shea Nero	<input type="checkbox"/> Lesia Starling/Los Angel	LesiaStarling@DPSS.LACounty.Gov
<input type="checkbox"/> Bonnie Tran	<input type="checkbox"/> Stella Anaya/Orange	Estela.Anaya@ssa.ocgov.com
<input type="checkbox"/> Roger Brill	<input type="checkbox"/> Luke Delacruz/Riverside	ldelacru@riversidedpss.org
<input type="checkbox"/> David Bullard	<input type="checkbox"/> Maureen Votta/C-IV	vottam@c-iv.org
<input type="checkbox"/> Emily Yamamoto	<input type="checkbox"/> Theresa Hasbrouck/Stan	hasbrot@stancounty.com
<input type="checkbox"/> Ken Buehler	<input type="checkbox"/> Tammie Allison/Fesno	taallison@co.fresno.ca.us

Agenda:

Agenda Items	Notes
1. Introductions	
2. MEDIL 15-43	
3. IN-95 Reprint Screen/Functionality	
4. Foster Care policy and identifying authorized personnel	
5. Mailing	
6. Action Items	

Updates:

1. **MEDIL 15-43/Scripts:**
 - a. County concerns with messaging on call scripts directing consumers to county offices for reprint requests and reprint functionality not ready until March MOE (2/24/16).
 - b. MCED will explore two options:
 - TPLRD online form
 - Update messaging

2. **IN-95 Reprint Screen/Functionality**
 - a. Reprint: 2/24
 - b. Correction/Replacement: 3/28
 - c. IRS transmission: 4/28

3. **Foster Care policy and identifying authorized personnel**
 - a. Working offline with DSS to resolve privacy concerns
 - b. Follow up meeting set for Friday 1/15 @ 2:30pm.

Duplicate Criteria:

- Elements listed on the IRS Tax Form 1095-B that may be subject to dispute are the beneficiary's:
 - Corrections must be made when any of the following is found to be erroneous:
 - Date of Birth
 - Social Security Number
 - Months of coverage
 - Change of name
 - Change of #EIN
 - Origin of Policy
 - Filing Corrected Returns:
 - Technical Issues must be made within 60 days of the original transmission.
 - Items referenced above.
 - Updates to Status or changes reported by beneficiaries have no deadline
 - IRS policy reserves a four (4) year maximum for amendments on tax filing.
 - Recipients must receive a new 1095 (b) for corrections
 - Every time a corrected 1095 (b) is transmitted to the IRS.
 - Issuers must maintain coverage data for 4 years.
- DHCS will develop workflows for all developed policy as we confirm each one.

Process Review:

Process	Policy
Duplicate Eligibility (APTC/MC)	Utilize normal processes > CEW's send in remedy ticket
Duplicate Records (2x 1095-B)	EW11 > Counties merge records > MEDS catches changes at batch > sends new data to IRS
Mis-linked Records	Remedy > # of tickets open > Average time they are being fixed > Merry Lee Croslin needed.

Incorrect Information	Name Vs SSN; IRS errors > corrections [name changes are only reported the year they happen] Need: Case Scenarios
Pseudo SSN	Normal process
Reprint 1095-B	IN-95 transaction
MEDS Window to view history	IN-95 screen; 36 months + 15 months in MEDS.
Out of State transfers	Manually update > closed record to SAWS > online to MEDS. Leader/C-IV confirmed ok.

Action Items:

DHCS - Form 1095-B Returns Dispute Workgroup - Action Items (OPEN)

Item Number	Date Logged	Policy Topic	Division or Branch	Action Item	Requestor	Owner	Status	Notes
1	10/27/2015	Workflow for each process	MCED/POB	Provide a workflow visual of each policy/process discussed	County	Leejuan Camarena	Open	As policy is finalized, a workflow will be developed to capture change.
2	12/22/2015	Mis-Linked Records	MCED	Track Mis-Linked tickets/Remedy	Linda	Linda	Open	IT has new programmers working on Mis-Linked records
3	12/22/2015	Foster Care/Privacy	MCED	Investigate privacy concerns with confidential information for foster care placement	MCED	CDSS/DHCS	Open	Received guidance from CMS; Friday 1/15 @2pm discussion
4	12/22/2015	MEDIL 15-43	MCED	Tracking	WG	MCED	Closed	Issued 12/31/2015
5	12/22/2015	ACWDL	MCED	Tracking	WG	MCED	Open	Tentative date for review: 1/15