Tuesday, February 23, 2016
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
☐ Linn Hom	☐ Assmaa Elayyat/CWDA	elayyat@cwda.org
☐ Linda Page	☐ Anita Cirillo/San Bernardino	acirillo@hss.sbcounty.gov
☐ Sharon Perry	☐ Luis Ontiveros/Los Angeles	LuisOntiveros@dpss.lacounty.gov
☐ Shalan Rahul	☐ Maria Santana/Orange	Maria.Santana@ssa.ocgov.com
☐ Leejuan Camarena	☐ Melissa Polanco/Orange	Melissa.Polanco@ssa.ocgov.com
☐ Joel Thomas	☐ Isabel Rodriguez/Stanislaus	RodrigI@stancounty.com
☐ O'Shea Nero	☐ Lesia Starling/Los Angel	LesiaStarling@DPSS.LACounty.Gov
☐ Bonnie Tran	☐ Stella Anaya/Orange	Estela.Anaya@ssa.ocgov.com
☐ Roger Brill	☐ Luke Delacruz/Riverside	ldelacru@riversidedpss.org
☐ David Bullard	☐ Maureen Votta/C-IV	vottam@c-iv.org
☐ Emily Yamamoto	☐ Theresa Hasbrouck/Stan	hasbrot@stancounty.com
☐ Ken Buehler	☐ Tammie Allison/Fesno	taallison@co.fresno.ca.us

Agenda:

Agenda Items	Notes
1. Introductions	
2. FAQ in review	
3. Mailing	
4. IN95 readiness/instructions	
5. Action Items	

Update:

- Scripts: Scripts are being finalized today and will go out all helpdesks, partners, etc. Scripts will update reporting dates, self-attestation language, and system readiness for reprints.

- Mailing:
    - OSP has mailed 9.2 million letters thus far
- Action Items:
    - ACWDL is being reviewed and will be sent out very soon for stakeholder review.

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	12/22/2015	Mis-Linked Records	MCED	Track Mis-Linked tickets/Remedy	Linda	Linda	Open	IT has new programmers working on Mis-Linked records
2	12/22/2015	Foster Care/ Privacy	MCED	Investigate privacy concerns with confidential information for foster care placement	MCED	CDSS/DHCS	Open	Will reconvene with CDSS.
3	12/22/2015	ACWDL	MCED	Tracking	WG	MCED	Open	Incorporating scenarios
4	02/02/2016	Dual Coverage with CC and IRS	MCED	Meeting with IRS for forgiveness	WG	Leejuan	Open	TBC