



Tuesday, December 22, 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 Meeting Notes

**Attendees:**

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

**Agenda:**

Agenda Items	Notes
1. Introductions	
2. Mailing Schedule for Form 1095-B	
3. Foster Care policy and identifying authorized personnel	
4. Policy Summary	
5. Action Items	

## Discussion:

MEDIL and ACWDL content and tentative release dates. Will include updated FAQs, mailing schedule,

Foster Care Policy (CDSS not present at meeting) Privacy/security concerns regarding providing a reprint of the form to non-custodial parents. DHCS will need to contact CDSS and provide guidance on how these cases will be handled.

**(Action Item)**

3 new IT programmers were hired to help remedy the mislinked records in MEDS. Linda stated she would like to track the mislinked record remedy tickets to gain an understanding on how impactful they may be on this project. **(Action Item)**

Request was made to post IN-95 screenshot to the webpage. The webpage URL was requested to be sent out, as well as adding the mail order schedule, call script draft, county ops update and workflow to webpage. **(Action Item)**

There was a request to track the progress of the 1095-B January Mailing MEDIL and ACWDL as separate action items for this work group. **(Action Item)**

## 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] <b>Need: Case Scenarios</b>
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								
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	12/22/15	Mislabeled Records	MCED	Track mislabeled remedy tickets	Linda	Com Unit	Open	Check mislabeled remedy tickets on continuous basis to gain better understanding of potential impact.
3	12/22/15	Foster Care	MCED/DSS	Privacy / policy authorized access	Harold	Com Unit	Open	Research privacy / policy authorized access for non-custodial parents.
4	12/22/15	MEDIL	MCED	1095-B January mailing notification	County	Debra Wong-Kochi	Open	Track status of MEDIL's development progress.
5	12/22/15	ACWDL	MCED	1095-B Policy / operations guidance	County	Com Unit	Open	Track status of ACWDL's development progress.
6	12/22/15	Communication	MCED	Communication items	Leejuan	Com Unit	Open	Upload mail order schedule, call script draft, IN-95 screen, county ops update and workflow to webpage.