



# IRS FORM 1095-A TOOLKIT

## IRS Form 1095-A Toolkit

### To: Certified Insurance Agents (CIAs), Certified Enrollment Counselors (CECs), and Plan-Based Enrollers (PBEs)

In late January 2015, Covered California consumers will begin to receive a notice from Covered California with the new IRS Form 1095-A. This form will help consumers reconcile the Advanced Premium Tax Credit (APTC) they received for the 2014 benefit year to the actual amount of Premium Tax Credit (PTC) they were eligible for in 2014 based on the actual Modified Adjusted Gross Income (MAGI) they will report to the IRS on their taxes.

Covered California has prepared this toolkit to help educate our partners and clients about the purpose of the form and how to use it in preparation for the tax season. The included material, listed below, is a comprehensive overview and should provide the answers to many of your questions in our Frequently Asked Questions (FAQs). The talking points provide a high-level overview of essential information your clients will want to know. You will also find a CalHEERS job aid that will assist you and your clients in downloading the IRS Form 1095-A from their accounts on CoveredCA.com, and it includes an explanation of the fields on the notice that will be sent to consumers.

**Click the following links to access resources with more detailed information regarding the 1095 IRS Form.**

#### **1095-A TOOLKIT:**

- [Talking Points](#)
- [Incorrect IRS Form 1095-A Talking Points](#)
- [Print Ready Article to Explain Special Enrollment Opportunity to Clients](#)
- [FAQs](#)
- [FAQs \(Spanish\)](#)
- [Job Aid](#)
- [1095-A Webinar](#) (Click to view webinar recording)
- [1095-A Webinar slide deck PDF](#)
- [1095-A Webinar #2](#) (Click to view webinar recording)
- [1095-A Webinar #2 slide deck PDF](#)
- [Medi-Cal Tax Filing FAQs](#)
- [1095-A Dispute Form](#)
- [1095-A Dispute Form \(Spanish\)](#)
- [1095-A Fact Sheet](#)
- [1095-A Fact Sheet \(Spanish\)](#)
- [U.S. Department of the Treasury's FAQs](#)
- [U.S. Department of the Treasury's Statement](#)
- [Covered California Website Statement](#)



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- For more information, visit the You're In webpage, which features a section on the 1095-A Form, by clicking this link: <http://www.coveredca.com/youre-in/form-1095-a/>



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CalNOD62A – Health Insurance Marketplace Statement: Consumer Notices (5)

- [English](#)
- [Spanish](#)
- [Chinese](#)
- [Vietnamese](#)
- [Korean](#)

### **Reminder for CECs, PBEs and CIAs:**

Do **NOT** produce or give tax advice to consumers on how to file their federal income taxes. Do **NOT** fill out federal tax forms. Your role is to educate consumers about the purpose of the IRS Form 1095-A and how to read it. **Note:** You may assist consumers with filling out the Covered California 1095-A Dispute Form, which is not an IRS Form.

Consumers may use the following IRS forms when completing the process, they are provided for reference only:

[IRS Form 1095-A](#)

[IRS Form 8962](#)

[IRS Form 8965](#)

### **Exemptions**

For more information on exemptions from the fees, visit: <https://www.healthcare.gov/fees-exemptions/>