

## Health Insurance Questionnaire

Affordable Care Act, ACA, or Obamacare, whatever you want to call it, you have new reporting requirements this year regarding your health insurance coverage. As of January 1, 2014, all taxpayers are required to have health insurance, or qualify for an exemption. As your tax preparer, I am required to exercise "due diligence" in ascertaining whether you have coverage, if that coverage qualifies as **minimum essential coverage**, and calculate any penalties for non-compliance. In order to do this, I will need the answer to several questions. Please review these questions, answer them as best you can, and we can get through this ordeal. Not answering these questions will delay completion of your return.

What (if any) health insurance did you or your dependents have in 2014? (Attach a copy of your insurance card or bring it to your appointment)

- Medicare
- Medicaid
- Employer-provided (if some members of your family are not covered, list them below)
- Private Insurance
- Government Marketplace
- Other (such as Veterans Affairs) \_\_\_\_\_

List all members of the family. For each member list the months (if any) he or she did **not** have health insurance (note: even if a member is only covered for one day for a particular month, he/she is considered covered for the entire month)

Family Member	Months Not Covered
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Did you receive a Form 1095? Yes \_\_\_ No \_\_\_ (If yes, attach a copy or bring it to your appointment)

If you have insurance from the Government Marketplace:

- a) Did you cover anyone who is **not** a dependent on your tax return? (if yes, attach or bring a copy of their tax return)
- b) Did you receive a subsidy from the Marketplace that reduced the monthly premium for your insurance (also called an Advance Premium Tax Credit)? Yes \_\_\_ No \_\_\_  
If yes, what was the amount of the monthly subsidy? \$ \_\_\_\_\_

If you purchased your own insurance, not from the Marketplace, not from an employer, not Medicare, Medicaid or other government plans, do you know if your plan provided the required minimum essential coverage? Yes \_\_\_ No \_\_\_

Hint: If it was a "short term" policy, did not offer free preventative care benefits or did not cover a pre-existing condition, it did not provide minimum essential coverage.

If you did not have health insurance and believe you may be exempt from the requirement, please attach a brief explanation as to why you believe you are exempt.