

**\*\* AFFORDABLE CARE ACT (ACA) CHECKLIST AND INFORMATION REQUIRED \*\***

1. For taxpayers covered with minimum essential coverage for the entire year including their family (anyone that will be claimed on your tax return) either through an employer provided health insurance, Medicare, Medicaid, or your own individual plan, please check here \_\_\_\_\_ and sign and date below:

**Sign and Date:** \_\_\_\_\_

2. If you and any member of your household **WAS NOT** covered for the full year with minimum essential coverage, you may be subject to a PENALTY for the months you and/or your family was not covered with minimum essential coverage. To avoid this penalty, we will need an **“Exemption Certificate Number”** issued by the Health Insurance Marketplace or **“Other Exemption”** such as unaffordable coverage cost for example, to complete your tax return. Again, this applies to everyone listed on your tax return.
3. If you purchased or had medical insurance for you and/or your family with minimum essential coverage for the 2015, you will receive some type of Form 1095. The various types of Form 1095 are as follows:
  - a. 1095-A From the Health Care Exchange or Health Insurance Marketplace
  - b. 1095-B From the health insurance provider
  - c. 1095-C From the employer

**Depending on your circumstances, it is possible to receive all three of these documents. Please do not ignore. We need the information contained in one or more of these documents to complete your return.**

4. If you purchased insurance through the Health Insurance Marketplace and received a subsidy, this information must be provided to us. Again, this information will appear on any 1095-A. This is critical information and must be provided to us if you purchased health insurance through the Health Insurance Marketplace.
5. **Other important issues regarding subsidies. If you received a subsidy, the following items apply:**
  - a. **We need income for ALL members of your household covered under your health insurance policy. If your dependents were covered under your policy and you received a subsidy, then we need their income or a copy of their tax return before we can complete your tax return.**
  - b. **If you received a subsidy, the IRS requires that you file your tax return by April 18<sup>th</sup>, 2016.**