

Affordable Care Act (“ObamaCare”) Worksheet

As a result of the Affordable Care Act (ACA), in 2014 most Americans are required to have health insurance, and report an explanation of coverage on their income tax returns. This new requirement adds several new forms to most tax returns, and noticeably increases the amount of time required to prepare those returns.

Worksheet Directions

Please provide information about the 2014 insurance coverage for Taxpayer, Spouse, and any Dependents. In the chart below, enter the appropriate letter for each individual. If coverage was the same for all 12 months of the year, enter the appropriate letter only in the “All 12 Mo” column. Otherwise, indicate coverage for each month separately.

Type of Coverage	Letter to Enter in Chart	Type of Coverage	Letter to Enter in Chart
None	N	Medicare	M
Employer/Company	C	Marketplace/Exchange	E
Direct Purchase	D	Exempt	X
Deceased	--		

	All 12 Mo	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Taxpayer													
Spouse													
DEPENDENTS (Name)													
1													
2													
3													
4													

The new Affordable Care Act forms you may receive:

Form 1095-A

Health Insurance Marketplace Statement

If you or a dependent were covered by a health insurance policy purchased on a Federal or State marketplace/exchange, you will be sent form **1095-A** as evidence of coverage. **You must provide our office this form in order for us to prepare your return.**

Forms 1095-B and 1095-C

Health Coverage / Employer-Provided Health Insurance Offer and Coverage

For 2014 you may receive one of these forms if you or a dependent were covered under a health insurance policy provided by your employer, or purchased directly or through an insurance agent. These forms are not required to prepare your 2014 tax return.