

Affordable Care Act Checklist 2015

- 1 Did every member of your household have minimal essential coverage for each month of 2017? Y N
- 2 What is the source of that coverage? Employer Medicare Exchange Other
- 3 Did you receive a 1095-A from the Insurance Marketplace? Please provide. Y N
- 4 Did you receive a 1095-B or 1095-C from any other source? Please provide. Y N
- 5 If any member of your household did not have coverage please list below:
- | | Name | Months of missing coverage |
|----|-------|----------------------------|
| a. | _____ | _____ |
| b. | _____ | _____ |
| c. | _____ | _____ |
| d. | _____ | _____ |
| e. | _____ | _____ |
- 6 Did your employer offer you coverage that you deemed unaffordable? Y N
 How much was the premium for a single person that was offered? \$ _____
- 7 Did you have a valid exemption? Domestic Violence Homeless
(Most of these exemptions require that you apply in advance to the Marketplace to get approval.) Eviction/Foreclosure Death of Family Member
Shut-Off Notice Fire, Flood, Disaster
Bankruptcy Medical Expense Debt

2017 Income Tax Information Update

✓	I changed my marital status
	My dependents have changed
	I changed jobs during 2016
	I received unemployment insurance
	I cashed stock, savings bonds, mutual funds
	I had transactions involving Crypto Currency
	I started a business, rec'd a 1099-Misc
	I bought an investment property
	I became a partner in a partnership
	I took funds out of an IRA or 401K
	I paid / received alimony
	I started collecting Social Security
	I have gambling winnings
	I had debt cancelled / negotiated down
	I paid Student Loan Interest
	I paid tuition or fees and books
	I am an educator and paid class expenses
	I received an inheritance
	I put money into an IRA voluntarily
	I adopted a child

✓	I paid long term care premiums
	I had significant medical expense
	I have a Health Savings Account
	I paid property taxes / mortgage interest
	I have more than one personal property
	I refinanced during the year
	I made charitable contributions
	I have work related expenses as an employee
	I paid daycare for a dependent
	I purchased or sold a house
	I made energy improvements to my home
	I worked / lived in another state
	I am a Volunteer Firefighter or Ambulance
	I am an 'injured spouse' for tax debt not mine
	I made estimated payments for 2017
	I paid for nursing home care
	I'm new and have copies from prior years
	I have a new bank account
	I have a new phone number
	I have a new email