

Deltek Costpoint®

Version 7.1.1

An abstract graphic composed of several overlapping, semi-transparent blue polygons. The shapes are arranged to create a sense of depth and movement, with some areas appearing more saturated than others. The overall effect is a modern, geometric design that occupies the lower half of the page.

June 30, 2016



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**CREATE 1094-C AND 1095-C
DATA AND ELECTRONIC FILE**

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AFFORDABLE CARE ACT OVERVIEW

The Patient Protection and Affordable Care Act (PPACA), commonly called the Affordable Care Act (ACA), is a United States federal statute signed into law on March 23, 2010. The ACA was enacted to increase the quality and affordability of health insurance, lower the uninsured rate by expanding public and private insurance coverage, and reduce the costs of healthcare for individuals and the government. It introduced mechanisms like mandates, subsidies, and insurance exchanges.

The law requires insurance companies to cover all applicants within new minimum standards and offer the same rates regardless of pre-existing conditions or sex.

To enforce the ACA, the Internal Revenue System (IRS) provided Section 6056 which requires employers with 50 or more full-time and equivalent employees, to describe the health coverage they offer by filing Form 1094-C (a transmittal) and Form 1095-C (an employee statement). Electronic filing is required for filing more than 250 returns under Section 6056 (Forms 1094-C and 1095-C) during the calendar year. The reporting requirements will apply for 2015 calendar year and reports are initially due in 2016.

For the information that needs to be reported, the final regulations of Section 6056 contain the general method as well as alternative reporting methods. The General method applies to all employers whereas the alternative methods apply to some employers only. Those employers who are qualified for alternative reporting method can also opt to use the general reporting method.

Since the general reporting method can meet the requirements of every employer that needs to comply with Section 6056 reporting, this topic provides the requirements for this method.

General Reporting Method Requirements

The following are required to be reported in general reporting method:

- The name, address, and employer identification number of the employer, and the calendar year for which the information is reported
- The name and telephone number of the employer's contact person
- A certification as to whether the full-time employees (and their dependents) can enroll in minimum essential coverage under an eligible employer-sponsored plan, by calendar month
- The number of full-time employees for each calendar month during the calendar year, by calendar month
- For each full-time employee, the months during the calendar year for which minimum essential coverage under the plan was available
- For each full-time employee, the employee's share of the lowest cost monthly premium for self-only coverage providing minimum value offered to that full-time employee under an eligible employer-sponsored plan, by calendar month
- The name, address, and social security number of each full-time employee during the calendar year and the months, if any, during which the employee was covered under an eligible employer-sponsored plan.

The following are other information required using indicator codes:

- Information as to whether the coverage offered to full-time employees and their dependents under an employer-sponsored plan provides minimum value and whether the employee had the opportunity to enroll his or her spouse in the coverage
- The total number of employees, by calendar month
- Whether an employee's effective date of coverage was affected by a permissible waiting period, by calendar month
- Whether the employer had no employees or otherwise credited any hours of service during any particular month, by calendar month
- Whether the employer is a person that is a member of an aggregated group, and, if applicable, the name and Employer Identification Number (EIN) of each employer member of the aggregated group constituting the applicable large employer on any day of the calendar year for which the information is reported
- If an appropriately designated person is reporting on behalf of an employer that is a governmental unit or any agency or instrumentality thereof for purposes of Section 6056, the name, address, and identification number of the appropriately designated person
- If an employer is a contributing employer to a multiemployer plan, whether, with respect to a full-time employee, the employer is not subject to an assessable payment due to the employer's contributions to the multiemployer plan

- If a third party is reporting for an employer with respect to the employer's full-time employees, the name, address, and identification number of the third party (in addition to the name, address, and EIN of the employer already required)

The following may need to be reported with respect to each full-time employee for each calendar month:

- Minimum essential coverage meeting minimum value was offered to:
 - The employee only
 - The employee and the employee's dependents only
 - The employee and the employee's spouse only
 - The employee, the employee's spouse and dependents
- Coverage was not offered to the employee and:
 - Any failure to offer coverage will not result in a payment, for example because the employee was in a limited non-assessment period for certain employees
 - The employee was not a full-time employee
 - The employee was not employed by the employer during that month
 - No other code or exception applies
- Coverage was offered to the employee for the month although the employee was not a full-time employee for that month
- The employee was covered under the plan
- The employer met one of the affordability safe harbors with respect to the employee

Employer Impact

Employers with 50 employees or fewer (full-time or full-time equivalent)

- You must withhold and report an additional 0.9 percent on employee wages or compensation that exceed \$200,000. (Medicare)
- You may be required to report the value of the health insurance coverage you provided to each employee on his or her Form W-2.
- Effective for calendar year 2015, if you provide self-insured health coverage to your employees, you must file an annual return reporting certain information for each employee you cover (Section 6055). Costpoint does NOT support the printing of 1094-B and 1095-B but you could use data gathered to manually complete the report.

Employers with greater than 50 employees (full-time or full-time equivalent)

- You must withhold and report an additional 0.9 percent on employee wages or compensation that exceed \$200,000. (Medicare)
- You may be required to report the value of the health insurance coverage you provided to each employee on his or her Form W-2.
- Effective for calendar year 2015, you must file an annual return in 2016 reporting whether and what health insurance you offered your employees. (1095-C)
- Effective for calendar year 2015, if you provide self-insured health coverage to your employees, you must file an annual return in 2016 reporting certain information for each employee you cover.

Required Forms

IRS Forms 1094-C and 1095-C are filed by employers that are required to offer health insurance coverage to their employees under the ACA. The main difference between them is that the 1095-C provides information about health insurance and is sent to both employees and the IRS, while the 1094-C acts as a cover sheet about the 1095-C and is sent only to the IRS.

1094-C

Employers must send copies of 1095-C forms to their workers and they also have to send them to the IRS. When you send the 1095-C forms to the IRS, you must also file Form 1094-C. The Form 1094-C provides information about:

- The employer including address, phone number, employer identification number

CREATE 1094-C AND 1095-C DATA AND ELECTRONIC FILE

- The number of employees working for employer
- The name of a contact person
- The number of full-time employees for each calendar month during the calendar year, by calendar month
- The months, if any, during which the employee was covered under an eligible employer-sponsored plan.
- The number of 1095-C forms that are being sent

1095-C

The ACA requires employers with at least 50 full-time workers to offer health insurance to their employees. Each year, those employers must send a statement (Form 1095-C) to all employees eligible for coverage.

Form 1095-C provides following information:

- The coverage offered to the employee
- The lowest-cost premium available to the employee
- The months of the year when the coverage was available

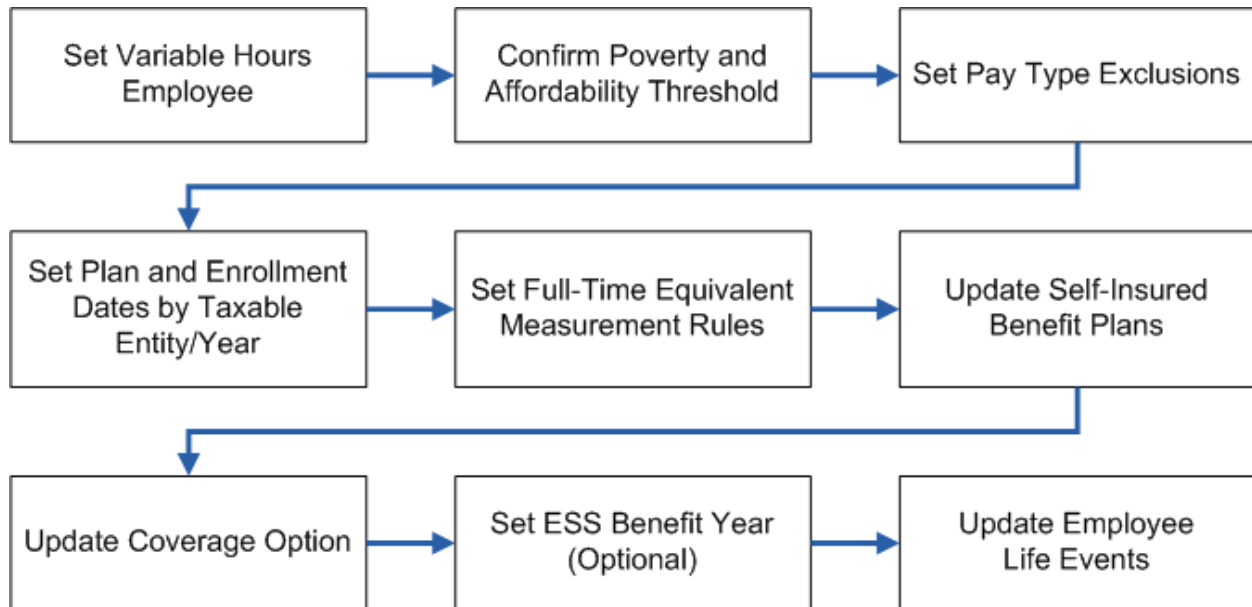
All employees eligible for coverage should get a copy of Form 1095-C, regardless of whether they actually participate in the employer's health plan. The forms are mandatory with the 2015 tax year.

Related Information

[SETTING UP AFFORDABLE CARE ACT DATA](#)

[GENERATING AFFORDABLE CARE ACT REPORTS](#)

SETTING UP AFFORDABLE CARE ACT DATA



Before you can generate the Affordable Care Act reports, Forms 1095-C and 1094C, you must complete the following steps to set up related settings in related Costpoint screens:

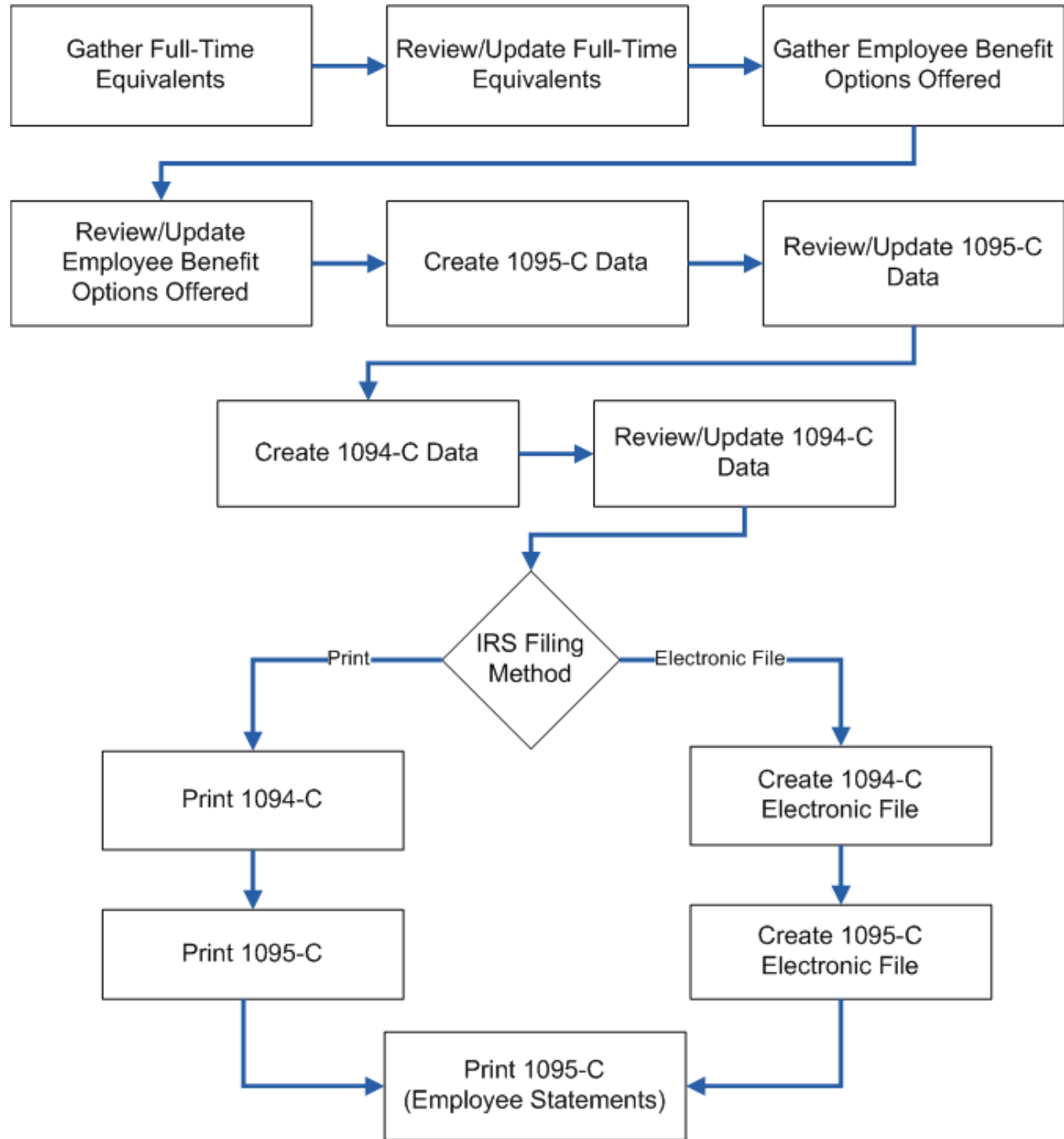
1. Set **Variable Hours Employees** on the Manage Employee Salary Information screen or through the Import Employee Data screen.
2. Confirm poverty and affordability threshold on the Manage Federal Taxes screen.
3. Set pay type exclusions on the Manage Pay Types screen.
4. Set plan and enrollment dates by taxable entity/year on the [Manage Benefit Years by Taxable Entity](#) screen.
5. Set rules for determining full-time equivalent (FTE) employees on the Full-Time Equivalent Measurement Rules subtask on the Manage Benefit Years by Taxable Entity screen.
6. Indicate employer self-insured benefit health plans on the Manage Benefit Plans screen.
7. Specify whether a benefit plan/coverage option provides minimal essential coverage and/or minimum value on the Coverage Options subtask of the Manage Benefit Plans screen. You can also set an override employee premium amount when necessary.
8. If you use Employee Self-Service (ESS), set the ESS benefit year on the Manage ESS Company Settings screen.
9. Set up life events that are classified as Benefit Qualifying Events on the Manage Employee Life Events screen.

Related Information

[AFFORDABLE CARE ACT OVERVIEW](#)

[GENERATING AFFORDABLE CARE ACT REPORTS](#)

GENERATING AFFORDABLE CARE ACT REPORTS



After configuring the settings for Affordable Care Act data, complete the following steps for generating the required 1095-C and 1094-C reports:

1. Run the [Analyze Full-Time Equivalent Eligibility](#) process to determine employees who qualify for full-time benefits based on their hours worked.
2. Review the full-time equivalent (FTE) records on the [Manage Full-Time Equivalent Eligibility](#) screen. You can also manually enter and edit full-time equivalent records on this screen.

3. Run the [Store Employee Benefit Options Offered](#) process to gather and create records for the benefit options offered. If you use ESS, the Activate Pending ESS Benefit Elections screen automatically gather benefit options offered.
4. Review and update employee benefit options offered records on the [Manage Employee Benefit Options Offered](#) screen.
5. Generate the 1095-C reporting data on the [Create 1095-C and 1094-C Data](#) screen.
6. Review and update 1095-C data on the [Manage 1095-C Data](#) screen.
7. Generate the 1094-C reporting data on the [Create 1095-C and 1094-C Data](#) screen.
8. Review and update 1094-C data on the [Manage 1094-C Data](#) screen.
9. If you have **fewer than 250** FTE employees, print the IRS copies of the reports. Print the paper 1094-C report on the [Print 1094-Cs](#) screen, and then print the paper 1095-C reports on the [Print 1095-Cs](#) screen.

If you have employees with more than six (6) dependents, you need to perform a separate run to print the 1095-C continuation form (Page 2 – Additional Dependents) for these employees. To print the continuation form, select the Page 2 (More than 6 dependents) option on the Print 1095-Cs screen when you run the printing process.

10. If you have **250 or more** FTE employees, create electronic files for reporting to IRS. Generate a 1094-C electronic file, and then a 1095-C electronic file through the [Create 1094-C and 1095-C Electronic File](#) screen.
11. Print paper copies of 1095-Cs on the Print 1095-Cs screen which you will provide to all FTE employees.

If you have employees with more than six (6) dependents, you need to perform a separate run to print the 1095-C continuation form (Page 2 – Additional Dependents) for these employees. To print the continuation form, select the Page 2 (More than 6 dependents) option on the Print 1095-Cs screen when you run the printing process.

Related Information

[SETTING UP AFFORDABLE CARE ACT DATA](#)

[AFFORDABLE CARE ACT OVERVIEW](#)

MANAGE BENEFIT YEARS BY TAXABLE ENTITY

In this screen, you can enter and maintain plan year dates, open enrollment dates, and full-time equivalent measurement rules for each Benefit Year/Taxable Entity combination. You can use this information for Affordable Care Act analysis and processing. This screen is available only if you are licensed for Costpoint Benefits (HF).

Location


- People
- Benefits
- Affordable Care Act

Identification

Benefit Year

Enter the 4-digit year into this data field. This value represents both the plan year and calendar year of the Affordable Care Act information.

Taxable Entity


Enter, or click  to select, the taxable entity for which benefit year data will be entered. The information linked to the Taxable Entity will be used to determine plan year dates, open enrollment dates, and transition relief certification flag for the Benefit Year and Taxable Entity.

Taxable Entity Description


This unlabeled field displays the description of the selected taxable entity.

Details


Open Enrollment Start Date

Enter, or click  to select, the open enrollment start date for the specified Benefit Year and Taxable Entity. This date cannot be later than the Open Enrollment End Date.


Open Enrollment End Date

Enter, or click  to select, the open enrollment end date for the specified Benefit Year and Taxable Entity. This date cannot be less than the Open Enrollment Start Date.

Plan Year Start Date

Enter, or click  to select, the plan year start date for the specified Benefit Year and Taxable Entity. This date cannot be later than the Plan Year End Date.

Plan Year End Date

Enter, or click  to select, the plan year end date for the specified Benefit Year and Taxable Entity. This date cannot be less than the Plan Year Start Date.

Certified for Transition Relief

Select this check box if the Taxable Entity is certified for Transition Relief in the Benefit Year.

For the 2015 calendar year only, to be eligible to use the Qualifying Offer Method Transition Relief, the employer must certify that it made a Qualifying Offer for one or more months of calendar year 2015 to at least 95% of its full-time employees. This method is intended to be used by an employer that makes a Qualifying Offer for some but not all 12 months of the year.

Subtask

Subtask	Description
Full-Time Equivalent Measurement Rules	Select this link to specify rules for evaluating employees for full-time status.

-
- [Table Information](#)

Changes to this screen update the following tables:

- HB_BENEFIT_YR_TE
- HB_BENEFIT_YR_FTE

MANAGE FULL-TIME EQUIVALENT ELIGIBILITY


On this screen, maintain and update Full-Time Equivalent Eligibility records that were processed on the [Analyze Full-Time Equivalent Eligibility](#) screen. You could also manually enter full-time equivalent eligibility records on this screen.

Location

- People
- Benefits
- Affordable Care Act

Identification


Employee

Enter, or click  to select, the employee who was analyzed for full-time status. The employee must exist in the Manage Employee Information table in order to be entered here.


Taxable Entity

This is the taxable entity to which the employee is assigned at the time the record was entered.

Measurement Period Start Date

Enter, or click  to select, the start date of the employee's measurement period. The employee's hours worked during the measurement period are used to determine whether or not the employee worked full-time hours during that time and is therefore eligible for benefits during the coverage period.

Measurement Period End Date

Enter, or click  to select, the end date of the employee's measurement period. The employee's hours worked during the measurement period are used to determine whether or not the employee worked full-time hours during that time and is therefore eligible for benefits during the coverage period.

Full-Time Equivalent

Select this check box to indicate that the employee's monthly average hours worked during the Maintenance Period make the employee eligible for full-time equivalent status during the specified coverage period. If an employee's average monthly hours worked during the maintenance Period are greater than or equal to the Monthly Full-Time Hours specified on the [Manage Benefit Year by Taxable Entity](#) screen, then the employee is considered as Full-Time Equivalent during the coverage period.

If this check box is not selected, it indicates that the employee's hours were analyzed and it was found that his hours were not greater than or equal to the Monthly Full-Time Hours specified in the Manage Benefit Year screen, so the employee is not considered Full-Time equivalent during the coverage period.

Coverage Offer Status

From the drop-down list, select an option to indicate whether or not the employee is eligible for coverage. This field is only available if the **Full-Time Equivalent** check box is checked. Valid options are:

- **Not Applicable** - This option will be displayed if the **Full-Time Equivalent** check box is not selected. It indicates that there is no benefit package being offered to the employee because the hours she worked during the Maintenance Period did not qualify her for full-time status during the coverage period.
- **Approval Pending** - This indicates that no decision has been made regarding the benefit package offer. The employee cannot elect the benefit options.
- **Approved** - This indicates that the benefit offerings listed in the Benefit Option Detail subtask have been approved. If you are using Deltek Employee Self Service (ESS), the [Store Employee Benefit Options Offered](#) application will not only generate Benefit Offering records that will be used for Affordable Care Act reporting and a Life Event record to indicate the employee's eligibility for benefits, but will also generate Life Event Enrollment Option records based on the approved Benefit Package. If you are not using Deltek ESS, the Store Employee Benefit Options Offered application will generate Benefit Offering records that will be used for Affordable Care Act reporting and a Life Event record to indicate the employee's eligibility for benefits.
- **Rejected** - Select this option to indicate that, though the employee was deemed to be eligible for full-time benefits, the benefit offer was rejected for the employee.

Analysis and Coverage Details

Analysis Type

From the drop-down list, specify the type of analysis performed. If this employee was employed for the past stability (coverage) period, then the employee is considered an Ongoing employee. If the employee is new and was not employed during the last stability (coverage) period, then this employee is considered an **Initial** employee.

Benefit Year

Enter the Benefit Year to be used for retrieving measurement, administrative, enrollment, and coverage period dates and methods. The Benefit Year and employee's Taxable Entity must exist in the Full-Time Equivalent Measurement Rules subtask on the [Manage Benefit Years by Taxable Entity](#) screen.


Measurement Period Total Hours

Enter the number of hours worked by the employee during the measurement period.


Average Hours Per Month

Enter the average number of hours worked per month by the employee during the measurement period. If the number of hours is greater than or equal to the full-time threshold specified by the federal government, then the employee is considered a full-time employee during the coverage period.

Administrative Period Start Date

After each measurement period, employers are allowed up to 3 months to analyze hours worked in order to determine which employees are eligible to be considered as full-time during the upcoming coverage period. Enter, or click  to select, the first day of the administrative period in this field.

Administrative Period End Date

After each measurement period, employers are allowed up to 3 months to analyze hours worked in order to determine which employees are eligible to be considered as full-time during the upcoming coverage period. Enter, or click  to select, the last day of the administrative period in this field.

Enrollment Method

From the drop-down list, select the method to be used for benefits enrollment for employees that are deemed to be full-time equivalents. Valid options are:


- **Open Enrollment** - Use this option if you plan on processing full-time equivalent employees' benefits enrollment at the same time you process enrollment for full-time employees (your normal open enrollment period). If you select this option, the enrollment dates and coverage dates must be the same as the dates on the main screen.

If you are a Deltek Employee Self Service client, any employees identified as full-time equivalent employees will be included in the ESS open enrollment process.


- **Life Event** - If your coverage and enrollment dates are not the same as the dates used for full-time employees, then select this option. Upon identifying full-time equivalent employees, an Employee Life Event record will be generated.

If you are a Deltek Employee Self Service client and you do not plan on having full-time equivalent benefits enrollment dates coincide with full-time benefits enrollment, then you must specify a Life Event which will trigger the Life Event Enrollment process. If the Analyze Full-Time Equivalent Eligibility screen identifies an employee as a full-time equivalent employee, an Employee Life Event record will be generated for that employee so he/she can enroll in benefits via the ESS Life Events enrollment process.


Enrollment Period Start Date

Enter, or click  to select, the start date of the enrollment period. The date must be prior to the coverage date ranges set up for the Benefit Plan/Coverage option combination on the Manage Benefit Plans screen.


Enrollment Period End Date

Enter, or click  to select, the end date of the coverage offering. The date must be prior to the coverage date ranges set up for the Benefit Plan/Coverage option combination in the Manage Benefit Plans screen.


Coverage Offer Start Date

Enter, or click  to select, the start date of the coverage offering. The date must be within the date ranges set up for the Benefit Plan/Coverage option combination in the Manage Benefit Plans screen.

Coverage Offer End Date

Enter, or click  to select, the end date of the coverage offering. The date must be within the date ranges set up for the Benefit Plan/Coverage option combination in the Manage Benefit Plans screen.


Life Event

Enter, or click  to select, the Life Event code which indicates the employee's eligibility for full-time status based on his/her hours worked during the Maintenance Period. This field is required if the Benefit Offer Status is **Approved**. Upon running the Process Benefit Option Offerings application, an Employee Life Events record will be generated for the Employee and Life Event with a Life Event Date equal to the Coverage Start Date.

If you are using the Life Event benefits enrollment functionality in Deltek ESS and a Life Event User flow is set up for the Life Event in Configure ESS Life Events, the addition of this Life Event will trigger the Life Event enrollment process for the employee in ESS.

The Life Event must exist in the Manage Life Events (HB_QUAL_EVENT) table in order to be specified here.

Benefit Package

Enter, or click  to select, the benefit Package for which the employee is eligible as of the effective Date.

Employee Details

Hire Date

Enter, or click  to select, the employee's Current Hire Date. This value will be stored upon saving the record. If the employee's **Hire Date** changes on the Manage Employee Information screen, that change will not be reflected here.

Employee Type

From the drop-down list, select an option to classify the employee's position as **Part-time**, **Regular**, or **Temporary** as of the measurement period start date. This value will be stored upon saving the record. If the employee's **Type** changes on the Manage Employee Salary Information screen, that change will not be reflected here.

A Part-Time type may be the reason the employee was analyzed for full-time status.

Rate Type

From the drop-down list, select an option to classify the employee's Rate Type as **Hourly**, **Salaried Fixed Hours**, or **Salaried Fluctuating Hours** as of the measurement period start date. This value will be stored upon saving the record. If the employee's **Rate Type** changes in the Manage Employee Salary Information screen, that change will not be reflected here.


Variable Hours Employee

Select check box to indicate that the employee is flagged as a **Variable Hours Employee** as of the measurement period start date. This value will be stored upon saving the record. If the employee's **Variable Hours Employee** check box changes on the Manage Employee Salary Information screen, that change will not be reflected here.

Seasonal Employee


Select this check box to indicate that the employee is seasonal as of the measurement period start date. This value will be stored upon saving the record. If the employee's **Seasonal Employee** check box changes on the Manage Employee Salary Information screen, that change will not be reflected here.

State/Province

Enter, or click  to select, the employee's State of residence as of the measurement period start date. If the Benefit Plan eligibility is based on State, this can help indicate how the Benefit Plan list was determined. The State must exist in the STATE table in order to be specified here.

This value will be stored upon saving the record. If the employee's state/province changes on the Manage Employee Information screen, that change will not be reflected here.

Labor Group

Enter, or click  to select, the labor group of the employee as of the measurement period start date. If the Benefit Package Defaults are based on labor group, this can help indicate how the Benefit Package was determined. The labor group must exist on the Manage Labor Groups (LAB_GRP) table in order to be specified here.

This value will be stored upon saving the record. If the employee's labor group changes in the Manage Employee Salary Information screen, that change will not be reflected here.

Notes

Enter any notes that apply to this Full-Time Equivalent Eligibility record.

▶ [Table Information](#)

Changes to this screen update the HB_EMPL_FULLTIME_EQUIV table.

ANALYZE FULL-TIME EQUIVALENT ELIGIBILITY

Run this process to use the employee's hours worked during the appropriate measurement (look-back) period to determine whether the employee's hours during that time make him/her a full-time equivalent employee based on Affordable Care Act (ACA) regulations.

Before using this screen you will need to:

1. Set up **Taxable Entity/Benefit Year** combinations in the [Manage Benefit Years by Taxable Entity](#) screen
2. Set **Variable Hours Employee** check box for appropriate employees in the Manage Employee Salary Information screen.
3. Set **Exclude from ACA Full-Time Equivalent Analysis** check box for any appropriate pay types in the Manage Pay Types screen.
4. Set up Life Event which would indicate an employee's eligibility for benefits as a full-time equivalent employee. This Life Event must be flagged as a **Benefit Qualifying Event** in the Manage Employee Life Events screen.

[Location](#)


- People
- Benefits
- Affordable Care Act

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Taxable Entity

Range Type

From the drop-down list select the type of Taxable Entity range to be included in the processing. You can select one of the standard range types (**All**, **Range**, **One**, **From Beginning**, and **To End**). This field is disabled and displays **All** if you select the **Taxable Entity Non-Contiguous Range** check box.

Start

Enter, or click  to select, the starting value for the Taxable Entity range.

End

Enter, or click  to select, the ending value for the Taxable Entity range.

Taxable Entity Non-Contiguous Range

Select this check box to select a non-contiguous range for Taxable Entity selection. Use the Taxable Entity Non-Contiguous Range subtask to select the range of items you would like to include in the processing.


Employees**Range Type**

From the drop-down list select the type of employee range to be included in the processing. You can select one of the standard range types (**All**, **Range**, **One**, **From Beginning**, and **To End**). This field is disabled and displays **All** if you select the **Employee Non-Contiguous Range** check box.

Start

Enter, or click  to select, the starting value for the employee range.

End

Enter, or click  to select, the ending value for the employee range.

Employee Non-Contiguous Range

Select this check box to select a non-contiguous range for employee selection. Use the Employee Non-Contiguous Range subtask to select the range of items you would like to include in the processing.

Date Selection Method

Select the type of date range to be used when selecting employees for processing.

Select employees with measurement periods ending in the prior calendar month

Select this option to populate the screen **Start Date** and **End Date** fields with the first day of the calendar month prior to the system date and the last day of the calendar month prior to the system date. For example, if the system date is **03/18/2015**, then the **Start Date** would be set to **02/01/2015** and the **End Date** would be set to **02/28/2015**.

Select employees with measurement periods ending within a specific date range

If you select this option, you can manually enter a range of dates to be processed. The dates must be within the same calendar year.


Measurement Period End Dates

If you selected the **Select employees with measurement periods ending within a specific date range** option as the **Date Method**, use this fields to enter a date range.

Range Type

This field is disabled and always displays **Range** as the field value.

Start

Enter, or click  to select, the start date which will be used to select employees for processing. Employees that have measurement period end dates within the screen date parameters will be analyzed for full-time status eligibility. Employees whose total hours worked during the measurement period result in monthly average hours greater than the government specified threshold will be flagged as full-time. You may approve or reject the employee's full-time status in the [Manage Full-Time Equivalent Eligibility](#) screen.

This field is disabled and populated with the first day of the prior calendar month if the **Date Method** is **Select employees with measurement periods ending in the prior calendar month**.

End

Enter, or use Date Lookup to select, the end date which will be used to select employees for processing. Employees that have measurement period end dates within the screen date parameters will be analyzed for full-time status eligibility. Employees whose total hours worked during the measurement period result

in monthly average hours greater than the government specified threshold will be flagged as full-time. You may approve or reject the employee's full-time status in the Manage Full-Time Equivalent Eligibility screen.

This field is disabled and populated with the last day of the prior calendar month if the **Date Method** is **Select employees with measurement periods ending in the prior calendar month**.

Options

If an employee's setup as of the measurement period end date meets any of the selected check boxes in this group box (**Include Part-Time Employees**, **Include Seasonal Employees**, or **Include Variable Hours Employees**), the employee will be included in processing. For example, if an employee has an Employee Type of **Part-Time** and is flagged as a **Variable Hours Employee** on the Manage Employee Salary Information screen, and you do not select the **Include Part-Time Employees** check box on this screen (but you do select the **Include Variable Hours Employees** check box), the employee will be included in the processing.

Benefit Year for Initial Employees

Enter the benefit year that you will use for retrieving measurement, administrative, enrollment, and coverage period dates and methods. The Benefit Year and employee's Taxable Entity must exist in the Full-Time Equivalent Measurement Rules subtask in the [Manage Benefit Years by Taxable Entity](#) screen.

Include Part-Time Employees

Select this check box to include Part-Time employees in the data selection. Any employees flagged as **Part-Time** as of the measurement period end date will have their hours-worked analyzed to determine whether their monthly average hours make them eligible for full-time status (in terms of benefits coverage) during the coverage period.

Include Variable Hours Employees

Select this check box to include Variable Hours employees in the data selection. Any employees flagged as a **Variable Hours Employee** as of the measurement period end date will have their hours-worked analyzed to determine whether their monthly average hours make them eligible for full-time status (in terms of benefits coverage) during the coverage period.

Include Seasonal Employees

Select this check box to include Seasonal employees in the data selection. Any employees flagged as a **Seasonal Employee** as of the measurement period end date will have their hours-worked analyzed to determine whether their monthly average hours make them eligible for full-time status (in terms of benefits coverage) during the coverage period.

Automatically approve eligible Employees for full-time status

If an employee's hours-worked during the measurement period make him/her eligible for full-time status during the benefit coverage period, you will have the ability to approve or reject that full-time status on the Manage Full-Time Equivalent Eligibility screen. If you would like to automatically approve any employees deemed full-time during the measurement period, select this check box.

Overwrite existing Full-Time Equivalent Eligibility and Employee Life Event records

Select this check box to overwrite any existing Full-Time Equivalent Eligibility and Employee Life Event records. The following items discuss how the process handles the corresponding records depending on your selection of this check box:

- **Full-Time Equivalent Eligibility** - When a full-time equivalent eligibility is identified for an employee, this application automatically generates a Full-Time Equivalent Eligibility record for the **Employee/Taxable Entity/Measurement Period Start Date** combination.

If you select this check box and the application identifies a full-time equivalent employee and the **Employee/Taxable Entity/Measurement Period Start Date** already exists in the Full-Time Equivalent table, the application will overwrite that record with a new one.

If you do not select this check box and a record already exists for the **Employee/Taxable Entity/Measurement Period Start Date** combination, this application will not overwrite those existing records and an error message will be generated on the Error/Warning report.
- **Employee Life Events** - When an initial (New) full-time equivalent employee is identified, this application automatically generates an Employee Life Event record where the **Life Event** is the one linked on the Full-Time Equivalent Measurement Rules subtask of the [Manage Benefit Years by Taxable Entity](#) screen and the **Life Event Date** is the Measurement Period End Date. A life event record may also be generated for an ongoing employee if the Enrollment Method is **Life Event** on the Full-Time Equivalent Measurement Rules subtask of the Manage Benefit Years by Taxable Entity screen.

If you select this check box and the application identifies a full-time equivalent employee that is set up to have a Life Event record set up, but an Employee Life Event record already exists for the **Employee/Life Event/Life Event Date** and you want that record overwritten with a new one.

If you do not select this check box and a record already exists for the **Employee/Life Event/Life Event Date** combination, this application will not overwrite those existing records and an error message will be generated on the Error/Warning report.

Subtasks

Subtask	Description
Taxable Entity Non-Contiguous Ranges	Select this link to enter taxable entity ranges that will be included in the processing.
Employee Non-Contiguous Ranges	Select this link to enter employee ranges that will be included in the processing.

STORE EMPLOYEE BENEFIT OPTIONS OFFERED

Run the Store Employee Benefit Options Offered process to store all employee and dependent benefit options offered to employees within the specified taxable entity and date parameters. For Affordable Care Act tracking, this application should be run on a scheduled basis using a Job Queue. The screen process stores benefit options for any employees where the effective date is within the enrollment dates of the Life Event or Open Enrollment.

Initially, run this process for all preceding months in the calendar year for which you are generating 1095-Cs. After the initial run, Non-ESS Users should run this process at least monthly. For ESS Users, the Activate Pending ESS Benefit Elections screen will automatically gather benefit options offered.

This screen performs the following operations:

- Selects all full-time (Regular) non-variable-hours employees that have an enrollment period which encompasses the screen **Benefit Year**. It also determines which, if any, Benefit Package for which they are eligible.
- Selects all full-time-equivalent employees that have an enrollment period which encompasses the screen **Benefit Year**. It also determines which, if any, Benefit Package for which they are eligible.
- Selects all non-full-time and non-full-time-equivalent employees that have an enrollment period which encompasses the screen **Benefit Year**. It also determines which, if any, Benefit Package for which they are eligible. The application performs this since part-time employees may be eligible for benefits as well.
- Selects all Employee Life Event records where the Life Event is flagged as a **Benefit Qualifying Event** and the **Benefit Year** is within the enrollment period (change period).

You can view and maintain the records created by this process by accessing the [Manage Employee Benefits Options Offered](#) screen.

Location


- People
- Benefits
- Affordable Care Act

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Benefit Year

Range Type

This field always displays the value **One**.

Start

Enter the Benefit Year for which benefit options will be determined and stored. This value is established in the [Manage Benefit Years by Taxable Entity](#) screen.

Taxable Entities

Range Type


From the drop-down list, select the type of taxable entity range to be included in the processing. You can select one taxable entity for processing or you can run the process for all Taxable Entity IDs within the Login Company.

The screen process will include employees linked to the specified taxable entities.


Valid options are:

- ☒ All
- ☐ One
- ☐ Range
- ☐ From Beginning
- ☐ To End

Start

If you selected **One**, **Range**, or **To End** as the taxable entity **Range Type**, enter, or click  to select, the taxable entity for which the process will be run. The screen process will include employees linked to the taxable entity parameter.

End

If you selected **Range** or **From Beginning** as the taxable entity **Range Type**, enter, or click  to select, the ending taxable entity value for which the process will be run. The screen process will include employees linked to the taxable entity parameter.

Taxable Entity Non-Contiguous Range

Select this check box to select a non-contiguous range for Taxable Entity selection. Use the Taxable Entity Non-Contiguous Range subtask to select the range of items that you would like to include in the processing.

Employees

Range Type

From the drop-down list, select the type of employee range to be included in the generation of employee Affordable Care Act data.


Valid options are:

- ☒ All
- ☐ One
- ☐ Range
- ☐ From Beginning
- ☐ To End

Start

Enter, or click  to select, the starting value for the selection of employees.

End

Enter, or click  to select, the ending value for the selection of employees.

Employee Non-Contiguous Range

Select this check box to select a non-contiguous range for employee selection. Use the Employee Non-Contiguous Range subtask to select the range of items that you would like to include in the processing.

Options

Overwrite Existing Benefit Options

Select this check box if you would like to overwrite any existing benefit option records for the employee and coverage start date. Select this check box when you have identified an error in the setup or employee information that requires you to overwrite and correct the employee's existing records.

If you do not select this check box and the employee already has an existing benefit option record or records for the employee and coverage start date, this application will not overwrite those existing records and an error message will be generated on the error/warning report.

Subtasks

Subtask	Description
Taxable Entity Non-Contiguous Ranges	Select this link to enter taxable entity ranges that will be included in the processing.
Employee Non-Contiguous Ranges	Select this link to enter employee ranges that will be included in the processing.

MANAGE EMPLOYEE BENEFIT OPTIONS OFFERED

On this screen, view and maintain the benefit offers of coverage for each full-time, ongoing full-time equivalent and initial full-time equivalent employee with an Employee Life Event. You can then report the data on this screen on the Affordable Care Act (ACA) 1095-C report.

You can either manually enter a record on this screen or you could generate the records by running the [Store Employee Benefit Options Offered](#) process or by the Activate Pending ESS Benefit Elections process.


You can also store and manage on this screen the dependents covered by each benefit option offering.

[Location](#)


- People
- Benefits
- Affordable Care Act

Identification

Employee

Enter, or click  to select, the employee for which benefit coverage offerings will be entered. The employee must exist in the Manage Employee Information table in order to be entered here. The name of the selected employee displays in the adjacent unlabeled field.

Taxable Entity

Enter, or click  to select, the taxable entity to which the employee is assigned at the time the record was entered.

Benefit Year

Enter the benefit year. The benefit year and employee's taxable entity must exist in the in the Manage Benefit Years by Taxable Entity screen.

Full-Time Equivalent


Select this check box to indicate that the employee was (or was considered) a full-time equivalent as of the Coverage Offer Start Date. This check box will be used when categorizing the employee's monthly coverage offering on the 1095-C report.

Employee Enrolled in Coverage on an Exchange


Select this check box to indicate that the employee is enrolled in coverage on an Exchange rather than electing one of the offered coverages

Benefit Offer Details


Benefit Package

Enter, or click  to select, the Benefit Package for which the employee is eligible as of the Effective Date.


Benefit Plan

Enter, or click  to select, the benefit plan being offered to the employee. The benefit plan must exist on the Manage Benefit Plans table in order to be entered here.


Coverage Option

Enter, or click  to select, the coverage option being offered to the employee. The coverage option must exist on the Manage Coverage Options table in order to be entered here and must be assigned to the specified Benefit Plan.

Coverage Offer Start Date

Enter, or click  to select, the date on which the benefit coverage offering is effective. For Affordable Care Act reporting purposes, the effective date is needed in order to know when the employee was eligible for the coverage offered.

Coverage Offer End Date

Enter, or click  to select, the end date of the coverage offering. The date must be within the date ranges set up for the Benefit Plan/Coverage option combination in the Manage Benefit Plans screen.

Enrollment Method

From the drop-down list, select whether the enrollment method is open enrollment or a life event benefit enrollment. Valid options are **Open Enrollment** and **Life Event Enrollment**.

Life Event

Enter, or click  to select, the Life Event code which triggered the employee's benefit s enrollment. This field is enabled and required if you selected **Life Event Enrollment** in the **Enrollment Method** field.

The Life Event must exist on the Manage Life Events table and be flagged as a **Benefits Qualifying Event** in order to be specified here.

Employee Monthly Premium

If the Benefit Plan's **Premium Calculation Method** is **Amount**, enter the amount of the monthly premium for which the employee is responsible.

Company Monthly Premium

If the Benefit Plan's **Premium Calculation Method** is **Amount**, enter the amount of the monthly premium for which the company is responsible.

Total Monthly Premium

This field displays the total monthly premium amount for the Benefit Plan/Coverage Option.

Cash-Out Amount

This is the amount that the employee will receive if they opt to be paid the cash-out amount, rather than electing the Benefit Option/Coverage Option.

Dependent(s) Eligible and Required

This non-editable check box indicates whether or not the Benefit Plan/Coverage Option combination requires assignments of dependents.

Dependent Type

This non-editable field indicates the type of dependents eligible for the Benefit Plan/Coverage Option. It will be populated based on the Benefit Plan/Coverage Option combination's setup in Manage Benefit Plans screen. Valid values in this field are:

- **Any** - This is the option for anything else. Costpoint checks to make sure that one or more dependents of any type have been selected.
- **Children** - This is the option for any qualified children or step-children.
- **Family** - This is the option for a spouse and at least one child or step-child.
- **Group** - This is the option for two or more of any type of dependent.
- **One** - This is the option for one dependent of any type.
- **Spouse** - This is the option for a spouse.
- **None** - This is the option if no dependents are eligible for the coverage.

Provides Minimum Essential Coverage

This non-editable check box is selected if the Benefit Plan/Coverage Option combination offers minimum essential coverage to the employee and, where applicable, his/her spouse and dependents. This value will be used in the Affordable Care Act reporting of form 1095-c.

Please see U.S. government regulations for a definition of "minimum essential coverage." The value will default upon entry of a valid Benefit Plan/Coverage Option combination


Minimum Value Provided

This non-editable check box is if the Benefit Plan/Coverage Option combination provides the minimum value to the employee and, where applicable, his/her spouse and dependents. This value will be used in the Affordable Care Act reporting of form 1095-c.

Please see U.S. government regulations for a definition of "minimum value."





Dependents

Dependent

Enter, or click  to select, the name of the dependent who is eligible for the Benefit Plan/Coverage Option combination. The Dependent must be assigned to the employee on the Manage Employee Dependents/Beneficiaries screen. Also, the Dependent must have a relationship to employee that meets the Eligible Dependents setting. So, if the Eligible Dependents is **Spouse**, then you can only select either a Wife or Husband in this field.

Gender

This field displays the gender of the selected dependent. The value loads from the Manage Employee Dependents/Beneficiaries screen after selecting a dependent. Valid values are:

-  **M** - Male
-  **F** - Female
-  **U** - Unknown
-  **O** - Other

Relationship



This field displays the relationship of the specified dependent to the employee. The value loads from the Manage Employee Dependents/Beneficiaries screen after selecting a dependent.

Date of Birth

This field displays the date of birth of the specified dependent. The value loads from the Manage Employee Dependents/Beneficiaries screen after selecting a dependent.

-
- [Table Information](#)


Changes to this screen update the following tables:

-  HB_EMPL_BEN_OFFER_HDR
-  HB_EMPL_BEN_OFFER_LN

CREATE 1094-C AND 1095-C DATA


Enter 1094-C and 1095-C data from this screen to print 1095-C and 1094-C data reports. If errors occur when you process data, they appear on the Create 1094-C and 1095-C Error and Warning Report. You must generate all the 1095-C data for each employee first before generating the 1095-C data for the company. The 1094-C report provides information on how many 1095-C reports are being submitted.

After following steps 1-4 in the [Generating Affordable Care Act Data](#) process, you complete steps 5 and 7 on this screen (steps 6 and 8 are review steps performed on the Manage 1094-C and Manage 1095-C screen):

5. Enter data on this screen selecting **1095-C** as the Reporting Type. Then click  and select **Print/Process 1094-C 1095-C** data to generate a 1095-C Data Report. If errors occur, view them on the Create 1094-C and 1095-C Error and Warning Report, which is also generated.

You must generate the data and print it to move on to the next step.

6. Open the [Manage 1095-C Data](#) application to review and, if necessary, edit the records. You may also manually add a record if needed. Regenerate the 1095-C data if you make changes.

7. Enter data on this screen selecting **1094-C** as the Reporting Type and click  and select **Print/Process 1094-C 1095-C data** to generate a 1094-C Data Report. If errors occur, view them on the Create 1094-C and 1095-C Error and Warning Report, which is also generated.

8. Open [Manage 1094-C Data](#) application to review and, if necessary, edit the records. You may also manually add a record if needed. Regenerate the 1094-C data if you make changes.

Depending on the size of your company, after these steps you either [create an XML file to submit electronically](#), or [print 1094-C](#) records and [print 1095-C](#) records and mail them to the IRS. For information about whether you must file electronically, see [Generating Affordable Care Act Reports](#).

Related Information

[Affordable Care Act Overview](#)

[Setting Up Affordable Care Act Data](#)

[Generating Affordable Care Act Reports](#)

[Create 1094-C and 1095-C Electronic File](#)

[Print 1094-C](#)

[Print 1095-C](#)

[Location](#)


- People
- Benefits
- Affordable Care Act

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Reporting Type

Use the options in this group box to select the type of reporting data to generate.

1095-C

Select this option to generate 1095-C records. After running the screen process, you can access and maintain the generated records on the [Manage 1095-C Data](#) screen.

A 1094-C is reported for a single Applicable Large Employer (ALE). However, if applicable, it also includes a list of other ALE members which are members of the same Aggregated ALE Group. In order to include the appropriate ALE members of an Aggregated ALE Group, when running this application, specify only the Taxable Entities which belong to the Aggregated ALE Group. A 1094-C record will be generated for each Taxable Entity and the appropriate members will be listed in Parti IV- Other ALE Members of Aggregated ALE Group.

1094-C

Select this option to generate 1094-C records. After running the screen process, you can access and maintain the generated records on the [Manage 1094-C Data](#) screen.

Selection Ranges

Calendar Year

Range Type

This field always displays the range type **One**. You can only select one calendar year to include in the process.

Start

Enter the 4-digit calendar year in this field. The application will gather 1095-C data for the entered year


Taxable Entity

Range Type

This field always displays the range type **One**. You can select only one taxable entity to include in the process.

If you are generating the 1094-C data for an Aggregated ALE Group, you must select the **Member of an Aggregate ALE Group** check box and specify the other Taxable Entities for processing in the Other Taxable Entities (Other ALE Members) subtask.

Start

Enter, or click  to select, the taxable entity you want to include in the process. If you selected the **1094-C** reporting type, the screen will generate 1094-C data for the specified taxable entity. If selected **1095-C** reporting type, the application generate 1095-C data for employees linked to the taxable entity.

Authoritative Transmittal

Check this box to indicate that this entity is the Authoritative Transmittal if you are creating 1094-Cs for an aggregated ALE group.

Authoritative Transmittal for Employers Filing Multiple Forms 1094-C A Form 1094-C must be filed when an employer files one or more Forms 1095-C. An employer may choose to file multiple Forms 1094-C, accompanied by

Forms 1095-C for some of its employees, provided that a Form 1095-C is filed for each employee for whom the employer is required to file.

In the case of an Aggregated ALE Group, each separate employer (referred to in these instructions as an ALE Member or employer) must file its own Authoritative Transmittal. Although an employer may file multiple Forms 1094-C, one "Authoritative Transmittal" Form 1094-C, identified on line 19, Part I as the Authoritative Transmittal, must be filed for each employer reporting aggregate employer-level data for all full-time employees of the employer.

Specifically, one Authoritative Transmittal must be filed for each employer, even if multiple Forms 1094-C are filed by and on behalf of that single employer. For example, if an employer intends to file a separate Form 1094-C for each of its two divisions to transmit Forms 1095-C for each division's full-time employees, one of the Forms 1094-C filed must be designated as the Authoritative Transmittal and report aggregate employer-level data for both divisions, as required in Parts II, III, and IV of Form 1094-C. The same rules apply in the case of a Governmental Unit that has delegated its reporting responsibilities for some of its employees to another Governmental Unit—see Designated Governmental Entity (DGE) in the Definitions section of these instructions for more information. In the case of a Governmental Unit that has delegated its reporting responsibilities for some of its employees, the Governmental Unit must ensure that among the multiple Forms 1094-C filed by or on behalf of the Governmental Unit transmitting Forms 1095-C for the Governmental Unit's employees, one of the filed Forms 1094-C is designated as the Authoritative Transmittal and reports aggregate employer-level data for the Governmental Unit, as required in Parts II, III, and IV of Form 1094-C. Example. County is an ALE made up of ALE Members School District, Police District, and County General Office. School District designates the state to report on behalf of the teachers and reports for itself for its remaining full-time employees. In this case, either the School District or the state must file an Authoritative Transmittal reporting aggregate employer-level data for the School District.

Member of an Aggregated ALE Group

Select this check box if the specified taxable entity is a member of an aggregated ALE group. If you select this check box, specify the other members in the Other Taxable Entities (Other ALE Members) subtask, accessible from the link at the bottom of the screen.

Employees

Range Type

Select the type of employee range to be included in the processing. You can select one of the standard range types (**All**, **Range**, **One**, **From Beginning**, and **To End**) or they may opt to run the process for a set of non-contiguous Employee IDs.

From the drop-down list, select the employee range option to include on this report. Valid options are:

- **All** - Select this option to include all employees in the process.
- **One** - Select this option to include only one employee in the process. Enter the employee in the **Start** field.
- **Range** - Select this option to include a range of employees in the process. The range begins with the employee entered in the **Start** field and it ends with the employee entered in the **End** field.
- **From Beginning** - Select this option to include the first employee up to the employee entered in the **End** field.
- **To End** - Select this option to include the employee entered in the **Start** field up to the last employee.

Start

Enter, or click  to select, the starting value for the employee range.

End

Enter, or click  to select, the starting value for the employee range.

Employee Non-Contiguous Range

Select this check box to select a non-contiguous range for employee selection. Use the Employee Non-Contiguous Range subtask to select the range of items you would like to include in the processing. The Employee Non-Contiguous Range subtask is accessible by clicking the link at the bottom of the screen.

Form 1094-C Options

ALE Member Total Employee Count Method (Fields 23b-25b)

According to IRS instructions, an employer must choose to use one of the following days of the month to determine the number of employees per month and must use that day for all months of the year.

First Day of Each Month

Select this option to use the first day of each month to determine the employee count.

Last Day of Each Month

Select this option to use the last day of each month to determine the employee count.

12th Day of Each Month

Select this option to use the 12th day of each month to determine the employee count.

First Day of First Payroll Period Starting in Each Month

Select this option to use the first day of the first payroll period that starts during each month to determine the employee count.

Last Day of First Payroll Period Starting During Each Month (last day must fall within the same calendar month)

Select this option to use the last day of the first payroll period that starts during each month to determine the employee count. You can select this option provided that for each month that last day falls within the calendar month in which the payroll period starts.

Certifications of Eligibility (Field 22)

Qualifying Offer Method

Select this box if the employer is eligible to use and is using the Qualifying Offer Method to report the information on Form 1095-C for one or more full-time employees.

To be eligible to use the Qualifying Offer Method, the employer must certify that it made a Qualifying Offer to one or more of its full-time employees for all months during the year in which the employee was a full-time employee for whom an employer shared responsibility payment could apply.

If the employer reports using this method, it must not complete on Form 1095-C, Part II, line 15, for any month for which a Qualifying Offer is made. Instead it must enter the Qualifying Offer code 1A on Form 1095-C, line 14, to indicate that the employee received a Qualifying Offer for all 12 months (in which case the employer must not, for any month, report the dollar amount on line 15). An employer is not required to use the Qualifying Offer Method, even if it is eligible and instead may enter on line 14 the applicable offer code and on line 15 the dollar amount required as an employee contribution for the lowest-cost employee-only coverage providing minimum value for that month.

If the employer is eligible to use the Qualifying Offer Method, it may report on Form 1095-C by entering the Qualifying Offer code 1A on Form 1095-C, line 14, for any month for which it made a Qualifying Offer to an employee, even if the employee did not receive a Qualifying Offer for all 12 calendar months. However, if employee receives a Qualifying Offer for less than all 12 months, the employer must furnish a copy of Form 1095-C to the employee unless the Qualifying Offer Method Transition Relief described later applies for 2015.

Qualifying Offer Method Transition Relief

Select this box if the employer is eligible for and is using the Qualifying Offer Method Transition Relief for the 2015 calendar year to report information on Form 1095-C for one or more full-time employees.

To be eligible to use the Qualifying Offer Method Transition Relief the employer must certify that it made a Qualifying Offer for one or more months of calendar year 2015 to at least 95% of its full-time employees. For this purpose, an employee in a Limited Non-Assessment Period is not included in the 95% calculation.

If an employer reports using this method, it must not complete Form 1095-C, Part II, line 15, for any month for which a Qualifying Offer is made or for which Qualifying Offer Method Transition Relief applies. An employer that reports using this method must enter on Form 1095-C, line 14, either the Qualifying Offer code 1A for any months for which the employee received a Qualifying Offer, or the Qualifying Offer Method Transition Relief code 1I for any months for which the employee did not receive a Qualifying Offer. An employer is not required to use this method, even if it is eligible and the employer may report on line 14 the applicable offer code and on line 15 the dollar amount required as an employee contribution for the lowest-cost employee-only coverage providing minimum value for that month. An employer may not, for any month, use code 1A or code 1I and also report the dollar amount on line 15.

Section 4980H Transition Relief

Select this box if the employer is eligible for section 4980H Transition Relief under either:

1. 2015 Section 4980H Transition Relief for ALEs with Fewer Than 100 Full-Time Employees, Including Full-Time Equivalent Employees (50-99 Transition Relief), or
2. 2015 Transition Relief for Calculation of Assessable Payments Under Section 4980H(a) for ALEs with 100 or More Full-Time Employees, Including Full-Time Equivalent Employees (100 or More Transition Relief).

For a description of the relief, including which employers are eligible for the relief, see *Section 4980H Transition Relief for 2015*, later. If an employer checks this box, it must also complete Form 1094-C, Part III, column (e), Section 4980H Transition Relief Indicator, to indicate the type of section 4980H transition relief for which it is eligible.

98% Offer Method

Select this box if the employer is eligible for and is using the 98% Offer Method.


To be eligible to use the 98% Offer Method, an employer must certify that taking into account all months during which the individuals were employees of the employer and were not in a Limited Non-Assessment Period, the employer offered, affordable health coverage providing minimum value to at least 98% of its employees for whom it is filing a Form 1095-C employee statement, and offered minimum essential coverage to those employees' dependents. The employer is not required to identify which of the employees for whom it is filing were full-time employees, but the employer is still required, under the general reporting rules, to file Forms 1095-C on behalf of all its full-time employees who were full-time employees for one or more months of the calendar year. To ensure compliance with the general reporting rules, an employer should confirm for any employee for whom it fails to file a Form 1095-C that the employee was not a full-time employee for any month of the calendar year. (For this purpose, the health coverage is affordable if the employer meets one of the section 4980H affordability safe harbors.)

Example of Employer Eligible for 98% Offer Method An employer has 325 employees. Out of the 325 employees, the employer identifies 25 employees as not possibly being full-time employees because they are scheduled to work 10 hours per week and are not eligible for additional hours. Out of the remaining 300 employees, 295 are offered affordable minimum value coverage for all periods during which they are employed other than any applicable waiting period (which qualifies as a Limited Non-Assessment Period).

The employer files a Form 1095-C for each of the 300 employees (excluding the 25 employees that it identified as not possibly being full-time employees). The employer may use the 98% Offer Method because it makes an affordable offer of coverage that provides minimum value to at least 98% of the employees for whom Employer files a Form 1095-C.

Using this method, the employer does not identify whether each of the 300 employees is a full-time employee. However, the employer must still file a Form 1095-C for all of its full-time employees. The employer chooses to file a Form 1095-C on behalf of all 300 employees, including the five employees to whom it did not offer coverage, because if one or more of those employees was, in fact, a full-time employee for one or more months of the calendar year, the employer would be required to have filed a Form 1095-C on behalf of those employees.

Designated Government Entity (DGE)


Enter, or click  to select, the designated governmental taxable entity which is filing on behalf of the employer for which the 1094-C record is being entered. The following Address values must be assigned to the taxable entity in the Configure Company Information screen in order to be entered here:

- Address Line 1
- City
- State/Province
- Country
- Postal Code

A DGE is a person or persons that are part of or related to the Governmental Unit that is the ALE Member and that is appropriately designated for purposes of these reporting requirements. In the case of a Governmental Unit that has delegated some or all of its reporting responsibilities to a DGE with respect to some or all of its employees, one Authoritative Transmittal must still be filed for that Governmental Unit reporting aggregate employer-level data for all employees of the Governmental Unit (including those for whom the Governmental Unit has delegated its reporting responsibilities). For more information, see *Authoritative Transmittal for Employers Filing Multiple Forms 1094-C*.

If you are a Designated Governmental Entity (DGE) filing on behalf of an employer, enter the necessary information in the **Designated Governmental Entity (DGE)**, **DGE Person to Contact**, and **DGE Contact Telephone Number** fields. If you are not a DGE filing on behalf of an employer do not enter information in these fields. For more information, see Designated Governmental Entity (DGE) in the Definitions section of the *IRS Instructions for Forms 1094-C and 1095-C*: <http://www.irs.gov/instructions/i109495c/ar01.html#d0e627>.

DGE Person to Contact

Enter, or click  to select, the contact Person who is responsible for answering any questions regarding the 1094-C.

DGE Contact Telephone Number

Enter the contact telephone number of the DGE which is filing on behalf of the employer. This field loads the telephone number assigned to the DGE on the Configure Company Information screen.


Options

Overwrite Existing Records

Select this check box if you would like to overwrite any existing non-voided, non-corrected 1095-C or 1094-C records for the Employee/Calendar Year/Taxable Entity combination. This check box should be used when you have identified an error in the setup or employee information that requires you to overwrite and correct the employee's existing records.

If you do not select this check box and a non-voided, non-corrected record already exists for the Employee/Calendar Year/Taxable Entity combination, this application will not overwrite those existing records and an error message will be generated on the Error/Warning report.

Contact Employee

Enter, or click  to select, the employee to contact who is responsible for answering any questions regarding the reporting.


Contact Telephone Number

This disabled field displays the name of the specified employee to contact.

Subtask

Subtask	Description
Other Taxable Entities (Other ALE Members)	Select this link to enter other members of aggregated ALE group.
Employee Non-Contiguous Ranges	Select this link to enter employee ranges that will be included in the processing.

Create and Print 1094-C and 1095 -C Data

Click  and select one of the following options to create an XML file for electronic filing of 1094-C and 1095-C data, and/or a paper copy.

- **Create 1094-C and 1095-C Data** — Create the data to print or submit electronically. You must first print the report before you can create the data.
- **Print/Process Create 1094-C and 1095-C Data** — Print and create the 1094-C and 1095-C data.
- **Batch Print/Process Create 1094-C and 1095-C Data** — Specify a time and date to create and print the 1094-C and 1095-C data.

MANAGE 1094-C DATA


Use this screen after you generate 1094-C records through the [Create 1094-C and 1095-C Data](#) screen. Thoroughly review the data on this screen before you create the 1094-C reports on the [Print 1094-Cs](#) screen and [Create 1094-C Electronic File](#) screen. You can also enter and change 1094-C information on this screen.

This screen is designed based on the actual 1094-C Form. For more information, please refer to the *IRS Instructions for Forms 1094-C and 1095-C* on <http://www.irs.gov/instructions/i109495c/ar01.html>.

Location

- ☐ People
- ☐ Benefits
- ☐ Affordable Care Act

Taxable Entity (ALE Member)

Enter, or click  to select, the taxable entity (ALE Member) for which the 1094-C record is being entered. The following Address values must be assigned to the taxable entity in the Configure Company Settings screen in order to be entered here:

- ☐ Address Line 1
- ☐ City
- ☐ State/Province
- ☐ Country
- ☐ Postal Code

Calendar Year

This is the calendar year for which the 1094-C is being created.

Corrected

Select this check box if you are correcting information on a Form 1094-C that was previously files with the IRS.

If correcting information on the Authoritative Transmittal (identified on Part I, line 19, as the Authoritative Transmittal, which must be filed for each employer reporting aggregate employer-level data for all full-time employees of the employer), file a standalone fully completed Form 1094-C including the correct information and enter an "X" in the **Corrected** check box.

Do not file a return correcting information on a Form 1094-C that is not the Authoritative Transmittal.

Sequence Number

This field displays the sequence number of the 1094-C for the specified Calendar Year / Taxable Entity combination. If the 1094-C does not yet exist in the Manage 1094-C Data table, then a Sequence Number of **1** (one) will be assigned. The sequence number will be incremented by one for any correcting 1094-Cs entered for the same Calendar Year / Taxable Entity combination.

File Accepted

This check box displays as selected when you processed this record on the [Create 1094-C and 1095-C Electronic File](#) screen using the **Confirm Records as Accepted by the IRS** processing option. The record is disabled and no longer editable if this check box is selected.

Generation ID

This field displays the data file generation key created when an electronic file is generated for 1094-C and 1095-C transmission. This ID is used when you process the record on the Create 1094-C and 1095-C Electronic File screen using the **Confirm Records as Accepted by the IRS** processing option.

Part I

Applicable Large Employer Member

1 Name of ALE Member (Taxable Entity Name)

This field displays the name of the employer for which the 1094-C record is being entered. This field loads the taxable entity name assigned to the taxable entity on the Configure Company Information screen.

2 Employer Identification Number (EIN)

This field displays the Employer Identification Number (EIN) of the employer for which the 1094-C record is being entered. This field loads the tax ID assigned to the taxable entity on the Configure Company Information screen.

3 Street Address (including room or suite number)

This field displays the street address (including room or suite number) of the employer for which the 1094-C record is being entered. This field loads the Address Line 1, Address Line 2, and Address Line 3 assigned to the taxable entity on the Configure Company Information screen.

4 City or Town

This field displays the city or town of the taxable entity for which the 1094-C record is being entered. This field loads the city assigned to the taxable entity on the Configure Company Information screen.

5 State/Province

This field displays the state/province of the taxable entity for which the 1094-C record is being entered. This field loads the state/province assigned to the taxable entity on the Configure Company Information screen.

6 Country and ZIP or Foreign Postal Code

This field displays the country and ZIP or foreign postal code of the taxable entity for which the 1094-C record is being entered. This field loads the country and postal code assigned to the taxable entity on the Configure Company Information screen.

7 Person to Contact


Enter, click  to select, the contact person who is responsible for answering any questions regarding the 1094-C. The name of the person displays in the adjacent unlabeled field.

8 Contact Telephone Number

Enter the contact telephone number of the taxable entity for which the 1094-C record is being entered. This field loads the telephone number assigned to the taxable entity on the Configure Company Information screen.

Designated Government Entity

Designated Government Entity (DGE) (if applicable)

Enter, or click  to select, the designated governmental taxable entity which is filing on behalf of the employer for which the 1094-C record is being entered. The following Address values must be assigned to the taxable entity in the Configure Company Information screen in order to be entered here:

- Address Line 1
- City
- State/Province
- Country
- Postal Code

A DGE is a person or persons that are part of or related to the Governmental Unit that is the ALE Member and that is appropriately designated for purposes of these reporting requirements. In the case of a Governmental Unit that has delegated some or all of its reporting responsibilities to a DGE with respect to some or all of its employees, one Authoritative Transmittal must still be filed for that Governmental Unit reporting aggregate employer-level data for all employees of the Governmental Unit (including those for whom the Governmental Unit has delegated its reporting responsibilities). For more information, see *Authoritative Transmittal for Employers Filing Multiple Forms 1094-C*.

9 Designated Government Entity Name

This field displays the name of the Designated Government Entity (DGE) which is filing on behalf of the employer. This field loads the taxable entity name assigned to the DGE on the Configure Company Information screen.

10 DGE Employee identification Number (EIN)

This field displays the Employer Identification Number (EIN) of the DGE which is filing on behalf of the employer. This field loads the tax ID assigned to the DGE on the Configure Company Information screen.

11 DGE Street Address (including room/suite number)

This field displays the street address (including room or suite number) of the DGE which is filing on behalf of the employer. This field loads the Address Line 1, Address Line 2, and Address Line 3 assigned to the DGE on the Configure Company Information screen.

12 DGE City or Town

This field displays the city or town of the DGE which is filing on behalf of the employer. This field loads the city assigned to the DGE on the Configure Company Information screen.


13 DGE State/Province

This field displays the state/province of the DGE which is filing on behalf of the employer. This field loads the state/province assigned to the DGE on the Configure Company Information screen.

14 DGE Country and ZIP or Foreign Postal Code

This field displays the country and ZIP or postal code of the DGE which is filing on behalf of the employer. This field loads the country and ZIP or postal code assigned to the DGE on the Configure Company Information screen.

15 DGE Person to Contact

Enter, or click  to select, the contact person who is responsible for answering any questions regarding the 1094-C.

16 DGE Contact Telephone Number

This field can be used to enter the contact telephone number of the DGE which is filing on behalf of the employer. This field loads the telephone number assigned to the DGE on the Configure Company Information screen.

Applicable Large Employer Member (ALE Member)

18 Total Number of Forms 1095-C Submitted with this Transmittal

Enter the total number of Forms 1095-C submitted with this Form 1094-C transmittal.

Part II - ALE Member Information

19 Authoritative Transmittal for this ALE Member

If this Form 1094-C transmittal is the Authoritative Transmittal that reports aggregate employer-level data for the employer, Select this check box and complete Parts II, III, and IV, to the extent applicable. Otherwise, complete the signature portion of Form 1094-C and leave the remainder of the form (lines 20-22 of Part II, and all of Parts III and IV) blank.

There must be only one Authoritative Transmittal filed for each employer. If this is the only Form 1094-C being filed for the employer, this Form 1094-C must report aggregate employer-level data for the employer and be identified on line 19 as the Authoritative Transmittal. If multiple Forms 1094-C are being filed for an employer so that Forms 1095-C for all full-time employees of the employer are not attached to a single Form 1094-C transmittal (because Forms 1095-C for some full-time employees of the employer are being transmitted separately), one of the Forms 1094-C must report aggregate employer-level data for the employer and be identified on line 19 as the Authoritative Transmittal.

20 Total number of Forms 1095-C filed by and/or on behalf of ALE Member

Enter the total number of Forms 1095-C that will be filed by and/or on behalf of the employer. This includes all Forms 1095-C that are filed with this transmittal including those filed for any individuals who enrolled in the employer-sponsored self-insured plan, and for any Forms 1095-C filed with a separate transmittal filed by or on behalf of the employer.

21 ALE Member is a member of an Aggregated ALE Group

Select this check box if the employer was a member of an Aggregated ALE Group during any month of the calendar year. If you select this check box, you need to:

1. Complete the **d) Aggregated Group Indicator** column in **Part III - ALE Member Information**, and then;

2. List the other members of the Aggregated ALE Group in the **Part IV - Other ALE Member of the Aggregated ALE Group** subtask.

Clear this check box if the employer was not a member of an Aggregated ALE Group for all 12 months of the calendar year. If this is the case, do not complete **Part III - column (d)**, or **Part IV**.

22 Certifications Eligibility

Qualifying Offer Method

Select this check box if the employer is eligible to use and is using the Qualifying Offer Method to report the information on Form 1095-C for one or more full-time employees.

According to the IRS instructions, to be eligible to use the Qualifying Offer Method, the employer must certify that it made a Qualifying Offer to one or more of its full-time employees for all months during the year in which the employee was a full-time employee for whom an employer shared responsibility payment could apply.

If the employer reports using this method, it must not complete on Form 1095-C, Part II, line 15, for any month for which a Qualifying Offer is made. Instead, it must enter the Qualifying Offer code 1A on Form 1095-C, line 14, to indicate that the employee received a Qualifying Offer for all 12 months (in which case the employer must not, for any month, report the dollar amount on line 15). An employer is not required to use the Qualifying Offer Method, even if it is eligible and instead may enter on line 14 the applicable offer code and on line 15 the dollar amount required as an employee contribution for the lowest-cost employee-only coverage providing minimum value for that month.

If the employer is eligible to use the Qualifying Offer Method, it may report on Form 1095-C by entering the Qualifying Offer code 1A on Form 1095-C, line 14, for any month for which it made a Qualifying Offer to an employee, even if the employee did not receive a Qualifying Offer for all 12 calendar months. However, if employee receives a Qualifying Offer for less than all 12 months, the employer must furnish a copy of Form 1095-C to the employee unless the Qualifying Offer Method Transition Relief described later applies for 2015.

Qualifying Offer Method Transition Relief

Select this check box if the employer is eligible for and is using the Qualifying Offer Method Transition Relief for the 2015 calendar year to report information on Form 1095-C for one or more full-time employees.

According to IRS instructions, to be eligible to use the Qualifying Offer Method Transition Relief, the employer must certify that it made a Qualifying Offer for one or more months of calendar year 2015 to at least 95% of its full-time employees. For this purpose, an employee in a Limited Non-Assessment Period is not included in the 95% calculation.

If an employer reports using this method, it must not complete Form 1095-C, Part II, line 15, for any month for which a Qualifying Offer is made or for which Qualifying Offer Method Transition Relief applies. An employer that reports using this method must enter on Form 1095-C, line 14, either the Qualifying Offer code 1A for any months for which the employee received a Qualifying Offer, or the Qualifying Offer Method Transition Relief code 1I for any months for which the employee did not receive a Qualifying Offer. An employer is not required to use this method, even if it is eligible and the employer may report on line 14 the applicable offer code and on line 15 the dollar amount required as an employee contribution for the lowest-cost employee-only coverage providing minimum value for that month. An employer may not, for any month, use code 1A or code 1I and also report the dollar amount on line 15.

Section 4980H Transition Relief

Select this check box if the employer is eligible for section 4980H Transition Relief under either:

- 2015 Section 4980H Transition Relief for ALEs with Fewer Than 100 Full-Time Employees, Including Full-Time Equivalent Employees (50-99 Transition Relief); or
- 2015 Transition Relief for Calculation of Assessable Payments Under Section 4980H(a) for ALEs with 100 or More Full-Time Employees, Including Full-Time Equivalent Employees (100 or More Transition Relief).

For a description of the relief, including which employers are eligible for the relief, see *Section 4980H Transition Relief for 2015* of the *IRS Instructions for Forms 1094-C and 1095-C*. If you select this check box, you must also complete Form 1094-C, Part III, column (e), Section 4980H Transition Relief Indicator, to indicate the type of section 4980H transition relief for which it is eligible.

98% Offer Method

Check this box if the employer is eligible for and is using the 98% Offer Method.

According to the IRS instructions, to be eligible to use the 98% Offer Method, an employer must certify that taking into account all months during which the individuals were employees of the employer and were not in a Limited Non-Assessment Period, the employer offered, affordable health coverage providing minimum value to at least

98% of its employees for whom it is filing a Form 1095-C employee statement, and offered minimum essential coverage to those employees' dependents. The employer is not required to identify which of the employees for whom it is filing were full-time employees, but the employer is still required, under the general reporting rules, to file Forms 1095-C on behalf of all its full-time employees who were full-time employees for one or more months of the calendar year. To ensure compliance with the general reporting rules, an employer should confirm for any employee for whom it fails to file a Form 1095-C that the employee was not a full-time employee for any month of the calendar year. (For this purpose, the health coverage is affordable if the employer meets one of the section 4980H affordability safe harbors.)

Example of Employer Eligible for 98% Offer Method An employer has 325 employees. Out of the 325 employees, the employer identifies 25 employees as not possibly being full-time employees because they are scheduled to work 10 hours per week and are not eligible for additional hours. Out of the remaining 300 employees, 295 are offered affordable minimum value coverage for all periods during which they are employed other than any applicable waiting period (which qualifies as a Limited Non-Assessment Period).

The employer files a Form 1095-C for each of the 300 employees (excluding the 25 employees that it identified as not possibly being full-time employees). The employer may use the 98% Offer Method because it makes an affordable offer of coverage that provides minimum value to at least 98% of the employees for whom Employer files a Form 1095-C.

Using this method, the employer does not identify whether each of the 300 employees is a full-time employee. However, the employer must still file a Form 1095-C for all of its full-time employees. The employer chooses to file a Form 1095-C on behalf of all 300 employees, including the five employees to whom it did not offer coverage, because if one or more of those employees was, in fact, a full-time employee for one or more months of the calendar year, the employer would be required to have filed a Form 1095-C on behalf of those employees.

Part III - ALE Member Information Monthly

23 All 12 Months

a) Minimal Essential Coverage Offer Indicator

From the drop-down list, select **Yes** or **No** to specify whether or not minimal essential coverage was offered to at least 95% of full-time employees/dependents for entire year.

Do not populate this field if minimal essential coverage was offered to at least 95% of full-time employees and dependents for some months of the year, but not in other months within the same year.

The following are the criteria for Column **(a) Minimum Essential Coverage Offer Indicator** in Form 1094-C:

- If the employer offered minimum essential coverage to at least 95% of its full-time employees and their dependents for the entire calendar year, enter **X** in the **Yes** check box on line 23 for **All 12 Months** or for each of the 12 calendar months.
- If the employer offered minimum essential coverage to at least 95% of its full-time employees and their dependents only for certain calendar months, enter **X** in the **Yes** check box for each applicable month. For the months, if any, for which the employer did not offer minimum essential coverage to at least 95% of its full-time employees and their dependents, enter **X** in the **No** check box for each applicable month.
- If the employer did not offer minimum essential coverage to at least 95% of its full-time employees and their dependents for any of the 12 months, enter **X** in the **No** check box for **All 12 Months** for each of the 12 calendar months.
- However, an employer that did not offer minimum essential coverage to at least 95% of its full-time employees and their dependents but is eligible for certain transition relief described in the instructions later under Section 4980H Transition Relief for 2015 should enter an **X** in the **Yes** check box for Part III, line 23, column (a), as applicable. See the instructions later under Section 4980H Transition Relief for 2015.

b) Full-Time Employee Count for ALE Member

Enter the number of full-time employees for each month, but do not count any employee in a Limited Non-Assessment Period. (If the number of full-time employees (excluding employees in a Limited Non-Assessment Period) for a month is zero, enter **0**.)

c) Total Employee Count for ALE Member

Enter the total number of all of your employees, including full-time employees and non-full-time employees and employees in a Limited Non-Assessment Period, for each calendar month.

An employer must choose to use one of the following days of the month to determine the number of employees per month and must use that day for all months of the year:

1. The first day of each month;
2. The last day of each month;
3. The 12th day of each month;
4. The first day of the first payroll period that starts during each month; or
5. The last day of the first payroll period that starts during each month (provided that for each month that last day falls within the calendar month in which the payroll period starts).

If the total number of employees was the same for every month of the entire calendar year, enter that number in line 23, column **(c) All 12 Months** or in the boxes for each month of the calendar year. If the number of employees for any month is zero, enter **0**.

d) Aggregated Group Indicator

From the drop-down list, select **Yes** or **No** to specify whether or not the taxable entity was a member of an Aggregated ALE Group.

Do not populate this field if the taxable entity was a member of an Aggregated ALE Group for some months of the year, but not in other months within the same year.

An employer must complete this column if it checked **Yes** on line 21, indicating that, during any month of the calendar year, it was a member of an Aggregated ALE Group. If the employer was a member of an Aggregated ALE Group during each month of the calendar year, enter **X** in the **All 12 Months** box or in the boxes for each of the 12 calendar months. If the employer was not a member of an Aggregated ALE Group for all 12 months but was a member of an Aggregated ALE Group for one or more month(s), enter **X** in each month for which it was a member of an Aggregated ALE Group. If an employer enters **X** in one or more months in this column, it must also complete **Part IV**.

e) Section 4980H Transition Relief

Select the applicable code if the employer certified Section 4980H Transition Relief eligibility in all 12 months. Valid options are:

- **A: 50-99** - Select this code if the employer certifies, by selecting box C (**Section 4980H Transition Relief** check box) on line **22**, that it is eligible for Section 4980H Transition Relief and is eligible for the 50 to 99 Relief.
- **B: 100 or More Relief** - Select this code if the employer certifies, by selecting box C (**Section 4980H Transition Relief** check box) on line **22**, that it is eligible for Section 4980H Transition Relief and is eligible for the 100 or More Relief.

An employer will not be eligible for both types of relief.

Lines 24 Jan to 35 Dec (Monthly Information)

Use lines **24 Jan** to **35 Dec** to specify information for each month of the calendar year. Each monthly line has the following columns:

a) Minimal Essential Coverage Offer Indicator

From the drop-down list, select **Yes** or **No** to specify whether or not minimal essential coverage was offered to at least 95% of full-time employees/dependents for the calendar month.

b) Full-Time Employee Count for ALE Member

Enter the number of full-time employees for the calendar month. Do not count any employee in a Limited Non-Assessment Period.

c) Total Employee Count for ALE Member

Enter the total number of all of your employees, including full-time employees and non-full-time employees and employees in a Limited Non-Assessment Period, for the calendar month.

d) Aggregated Group Indicator

From the drop-down list, select **Yes** or **No** to specify whether or not the taxable entity was a member of an Aggregated ALE Group.

e) Section 4980H Transition Relief

Select the applicable code if the employer certified Section 4980H Transition Relief eligibility in the calendar month. Valid options are:

- **A: 50-99** - Select this code if the employer certifies, by selecting box C (**Section 4980H Transition Relief** check box) on line **22**, that it is eligible for Section 4980H Transition Relief and is eligible for the 50 to 99 Relief.
- **B: 100 or More Relief** - Select this code if the employer certifies, by selecting box C (**Section 4980H Transition Relief** check box) on line **22**, that it is eligible for Section 4980H Transition Relief and is eligible for the 100 or More Relief.

An employer will not be eligible for both types of relief.

Subtask

Subtask	Description
Part IV - Other ALE Members of Aggregated ALE Group	Select this link to enter information for other members of aggregated ALE group.

- [Table Information](#)

Changes to this screen update the following tables:

- HB_1094C_DATA
- HB_1094C_TAXBLE_ENTITY

MANAGE 1095-C DATA


Use this screen after you generate 1095-C records through the [Create 1094-C and 1095-C Data](#) screen. Thoroughly review the data on this screen before you generate 1094-C information on the Create 1094-C and 1095-C Data screen or create the 1095-C reports on the [Print 1095-Cs](#) screen and [Create 1094-C and 1095-C Electronic File](#) screen. You can also enter and change 1095-C information on this screen.

This screen is designed based on the actual 1095-C Form. For more information, please refer to the *IRS Instructions for Forms 1094-C and 1095-C* on <http://www.irs.gov/instructions/i109495c/ar01.html>.

[Location](#)

- ☐ People
- ☐ Benefits
- ☐ Affordable Care Act

[Employee](#)


Enter, or click  to select, the employee for which the 1095-C record is being entered. The employee must be linked to the login company and must not be flagged as a **Contractor** on the Manage Employee Information screen in order to be entered here. The following Mailing Address values must be assigned to the Taxable Entity on the Configure Company Information screen in order to be entered here:

- ☐ Address Line 1
- ☐ City
- ☐ State/Province
- ☐ Country
- ☐ Postal Code

[Calendar Year](#)

Enter the 4-digit calendar year for which the 1095-C was created.

[Taxable Entity](#)

Enter, or click  to select, the taxable entity for which the 1095-C record is being entered. This field loads the Taxable Entity assigned to the employee on the Manage Employee Information screen. The value may be edited for a new record. The following address values must be assigned to the taxable Entity on the Configure Company Information screen in order to be entered here:

- ☐ Address Line 1
- ☐ City
- ☐ State/Province
- ☐ Country
- ☐ Postal Code

[Void](#)

Select this check box to void the 1095-C record.

[Corrected](#)

If correcting information on a Form 1095-C that was previously filed with the IRS, file a fully completed Form 1095-C including the correct information and enter an **X** in the **CORRECTED** check box. File a Form 1094-C Transmittal (DO NOT mark the **CORRECTED** check box on the Form 1094-C) with corrected Form(s) 1095-C. Furnish the employee a copy of the corrected Form 1095-C, unless the employer is eligible to use the Qualifying Offer Method or the Qualifying Offer Method Transition Relief for 2015.

For more information, see Alternative Method of Furnishing Form 1095-C to Employees under the Qualifying Offer Method or Alternative Method of Furnishing Form 1095-C to Employees under the Qualifying Offer Method Transition Relief.

[Sequence Number](#)

This field displays the sequence number of the 1095-C for the specified Employee / Calendar Year / Taxable Entity combination. If the 1095-C does not yet exist in the Manage 1095-C Data table, then a Sequence Number of **1** (one) will be assigned. The sequence number will be incremented by one for any correcting or voided 1095-Cs entered for the same Employee / Calendar Year / Taxable Entity combination.

File Accepted

This check box displays as selected when you processed this record on the [Create 1094-C and 1095-C Electronic File](#) screen using the **Confirm Records as Accepted by the IRS** processing option. The record is disabled and no longer editable if this check box is selected.

Record ID

This field displays the XML record ID which is the unique identifying number that designates the 1095-C record's location in the XML file submitted to the IRS.

Generation ID

This field displays the data file generation key created when an electronic file is generated for 1094-C and 1095-C transmission. This ID is used when you process the record on the Create 1094-C and 1095-C Electronic File screen using the **Confirm Records as Accepted by the IRS** processing option.

Part I

This group box contains employee and applicable large employer member information.

Employee

1 Name of Employee

This field displays the name of the employee for which the 1095-C record is being entered. This field loads the Displayed Name assigned to the employee on the Manage Employee Information screen.

2 Social Security Number

This field displays the Social Security Number (SSN) of the employee for which the 1095-C record is being entered. This field loads the SSN assigned to the employee on the Manage Employee Information screen.

3 Street Address (including apt number)

This field displays the street address (including apartment number) of the employee for which the 1095-C record is being entered. This field loads the Mailing Address-Address Line 1, Address Line 2, and Address Line 3 assigned to the employee on the Manage Employee Information screen.

4 City or Town

This field displays the city or town of the employee for which the 1095-C record is being entered. This field loads the Mailing Address City assigned to the employee on the Manage Employee Information screen.

5 State/Province

This field displays the State/Province of the employee for which the 1095-C record is being entered. This field loads the Mailing Address State/Province assigned to the employee on the Manage Employee Information screen.

6 Country and ZIP or Foreign Postal Code

This field displays the Country and Postal Code of the employee for which the 1095-C record is being entered. This field loads the Mailing Address Country and Postal Code assigned to the employee on the Manage Employee Information screen.

Applicable Large Employer Member (Employer)

7 Name of Employer

This field displays the name of the employer for which the 1095-C record is being entered. This field loads the name assigned to the taxable entity on the Configure Company Information screen.

8 Employer Identification Number

This field displays the Employer Identification Number (EIN) of the employer for which the 1095-C record is being entered. This field loads the tax ID assigned to the taxable entity on the Configure Company Information screen.

9 Street Address (including room or suite number)

This field displays the Street Address (including room or suite number) of the employer for which the 1095-C record is being entered. This field loads the Address Line 1, Address Line 2, and Address Line 3 assigned to the taxable entity on the Configure Company Information screen.

10 Contact Telephone Number

Enter the Contact Telephone Number of the taxable entity for which the 1095-C record is being entered. This field loads the telephone number assigned to the taxable entity on the Configure Company Information screen.

11 City or Town

This field displays the city or town of the taxable entity for which the 1095-C record is being entered. This field loads the city assigned to the taxable entity in the Configure Company Information screen.

12 State/Province

This field displays the state/province of the taxable entity for which the 1095-C record is being entered. This field loads the state/province assigned to the taxable entity on the Configure Company Information screen.

13 Country and ZIP or Foreign Postal Code

This field displays the country and ZIP or foreign postal code of the taxable entity for which the 1095-C record is being entered. This field loads the country and postal Code assigned to the taxable entity on the Configure Company Information screen.

Part II - Employee Offer and Coverage

Plan Start Month (Two-Digit Number)

From the drop-down list, select the beginning month of the plan year of the health plan in which is the employee is offered coverage. This may also be the month that the employee would be offered coverage if the employee were eligible to participate in the plan.

If more than one plan year could apply (for instance, if the employer changes the plan year during the year), enter the earliest applicable month. If there is no health plan under which coverage is offered to the employee, enter **00**.


14 Offer of Coverage

Use these fields to enter the offer of coverage that applies all 12 months of the calendar year or you can also enter the offer of coverage that applies to each month.

Valid options are:


- **1A** - Qualifying Offer: Minimum essential coverage providing minimum value offered to full-time employee with employee contribution for self-only coverage equal to or less than 9.5% mainland single federal poverty line and at least minimum essential coverage offered to spouse and dependent(s).
- **1B** - Minimum essential coverage providing minimum value offered to employee only.
- **1C** - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) (not spouse).
- **1D** - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to spouse (not dependent(s)).
- **1E** - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) and spouse.
- **1F** - Minimum essential coverage NOT providing minimum value offered to employee, or employee and spouse or dependent(s), or employee, spouse and dependents.
- **1G** - Offer of coverage to employee who was not a full-time employee for any month of the calendar year and who enrolled in self-insured coverage for one or more months of the calendar year. Enter code 1G in the "All 12 Months" box and do not complete the monthly boxes.
- **1H** - No offer of coverage (employee not offered any health coverage or employee offered coverage that is not minimum essential coverage).
- **1I** - Qualified Offer Transition Relief 2015: Employee (and spouse or dependents) received no offer of coverage, received an offer that is not a qualified offer, or received a qualified offer for less than 12 months.

All 12 Months

If the same Offer of Coverage code applies to the employee for all 12 months of the screen calendar year, enter, or click  to select, the Offer of Coverage code which applies to the employee.

Enter a value in this field only if the same Offer of Coverage code applies to the employee for the entire calendar year. If more than one code applies during the Calendar Year, leave this field blank.

Rows Jan - Dec

If the same Offer of Coverage code does not apply to every month in the year, enter, or click  to select, the Offer of Coverage code which applies to the specific month.

Enter a value in this field only if the same Offer of Coverage code does not apply to the employee for the entire calendar year. If the same code applies during the entire calendar year, leave this field blank.

15 Empl Share of Lowest Cost Monthly Prem

Use these fields to enter the Employee Share of Lowest Cost Monthly Premium amount that applies to all months of the calendar year. If the value does not apply to all months of the calendar year, use the fields for specific months to enter the value.

According to IRS instructions, complete line 15 only if code 1B, 1C, 1D, or 1E is entered on line 14 either in the **All 12 Months** box or in any of the monthly boxes. Enter the amount of the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee. Enter the amount including any cents. If the employee is offered coverage but is not required to contribute any amount towards the premium, enter **0.00** (do not leave blank). If the employee share of the lowest-cost monthly premium amount was the same amount for all 12 calendar months, enter that monthly amount in each monthly box or enter that monthly amount in the **All 12 Months** box and do not complete the monthly boxes. If the employee share of the lowest-cost monthly amount was not the same for all 12 months, enter the amount in each calendar month for which the employee was offered minimum value coverage.

All 12 Months

If the Offer of Coverage is **1B**, **1C**, **1D**, or **1E** for all 12 months and the same Employee Share of Lowest Cost Monthly Premium applies to all 12 months of the screen calendar year, enter the amount in this field.

Enter a value in this field only if the same Employee Share of Lowest Cost Monthly Premium applies to the employee for the entire Calendar Year. If more than one amount applies during the Calendar Year, leave this field blank.

Rows Jan - Dec

If the same Employee Share of Lowest Cost Monthly Premium does not apply to every month in the year, enter the amount that applies to the specific month.

Enter a value in this field only if the same Employee Share of Lowest Cost Monthly Premium amount does not apply to the employee for the entire calendar year. If the same amount applies during the entire calendar Year, leave this field blank.

16 Applicable Section 4980H Safe Harbor


Use these fields to specify a Section 4980H Safe Harbor code that applies to all months of the calendar year. If the codes are not the same for the whole calendar year, specify Section 4980H Safe Harbor codes in the fields for each month.

Valid Section 4980H Safe Harbor codes are as follows:

- **2A** - Employee not employed during the month. Enter code 2A if the employee was not employed on any day of the month. Do not use code 2A for a month if the individual is an employee of the employer on any day of the month. Do not use this code for the month during which an employee terminates employment with the employer.
- **2B** - Employee not a full-time employee. Enter code 2B if the employee is not a full-time employee for the month and did not enroll in minimum essential coverage, if offered for the month.
- **2C** - Employee enrolled in coverage offered. Enter code 2C for any month in which the employee enrolled in health coverage offered by the employer, regardless of whether any other code in Code Series 2 might also apply.
If the employee enrolled in the minimum essential coverage offered for the month, enter code 2C (employee enrolled in coverage offered), and not any other in Code Series 2 that might also apply.


- 2D** - Employee in a section 4980H(b) Limited Non-Assessment Period. Enter code 2D for any month during which an employee is in a Limited Non-Assessment Period for section 4980H(b). If an employee is in an initial measurement period, enter code 2D (employee in a section 4980H(b) Limited Non-Assessment Period) for the month, and not code 2B (employee not a full-time employee). For an employee in a section 4980H(b) Limited Non-Assessment Period for whom the employer is also eligible for the multiemployer interim rule relief for the month code 2E, enter code 2E (multiemployer interim rule relief) and not code 2D (employee in a Limited Non-Assessment Period).
- 2E** - Multiemployer interim rule relief. Enter code 2E for any month for which the multiemployer interim guidance applies for that employee. This relief is described in the Definitions under Offer of Health Coverage. Although employers may use the section 4980H affordability safe harbors to determine affordability for purposes of the multiemployer interim guidance, an employer eligible for the relief provided in the multiemployer interim guidance for a month for an employee should enter code 2E (multiemployer interim rule relief), and not a code for the section 4980H affordability safe harbors (codes 2F, 2G, or 2H).
- 2F** - Section 4980H affordability Form W-2 safe harbor. Enter code 2F if the employer used the section 4980H Form W-2 safe harbor to determine affordability for purposes of section 4980H(b) for this employee for the year. If an employer uses this safe harbor for an employee, it must be used for all months of the calendar year for which the employee is offered health coverage.
- 2G** - Section 4980H affordability federal poverty line safe harbor. Enter code 2G if the employer used the section 4980H federal poverty line safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any month(s).
- 2H** - Section 4980H affordability rate of pay safe harbor. Enter code 2H if the employer used the section 4980H rate of pay safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any month(s).
- 2I** - Non-calendar year transition relief applies to this employee. Enter code 2I if non-calendar year transition relief for section 4980H(b) applies to this employee for the month. See the instructions later under Section 4980H Transition Relief for 2015 and 2015 Section 4980H(b) Transition Relief for Employers with Non-Calendar Year Plans (Form 1095-C, line 16, code 2I), for a description of this relief.

All 12 Months

If the same Applicable Section 4980H Safe Harbor code applies to the employee for all 12 months of the screen calendar year, enter, or click  to select, the Section 4980H Safe Harbor code which applies to the employee.

Enter a value in this field only if the same Section 4980H Safe Harbor code applies to the employee for the entire calendar year. If more than one code applies during the calendar year, leave this field blank.

Rows Jan - Dec

If the same Section 4980H Safe Harbor code does not apply to every month in the year, enter, or click  to select, the Section 4980H Safe Harbor code which applies to the specific month.



Enter a value in this field only if the same Section 4980H Safe Harbor code does not apply to the employee for the entire calendar year. If the same code applies during the entire calendar year, leave this field blank.

Subtask

Subtask	Description
Part III - Covered Individuals	Select this link to enter Covered Individuals information.

- [Table Information](#)

Changes to this screen update the following tables:

-  HB_1095C_DATA
-  HB_1095C_COVERED

CREATE 1094-C AND 1095-C ELECTRONIC FILE

If you have **250 or more** FTE employees, you must create electronic files for reporting to IRS. You must also print the information to supply it to your employees.

Enter data on this screen to create an XML file for electronic filing.

If you filed a 1094-C and/or 1095-C Electronic file and it was accepted by the IRS (with or without errors), but it is later determined, by you or by the IRS, that the file contained erroneous information, you must submit a Correction File. Use this form to create a Correction File by selecting **Corrections** from the **Transmission Type** drop-down.

Related Information

[Affordable Care Act Overview](#)

[Setting Up Affordable Care Act Data](#)

[Generating Affordable Care Act Reports](#)

[Create 1094-C and 1095-C Data Reports](#)

[Print 1094-C Records](#)

[Print 1095-C Records](#)

Location


- People
- Benefits
- Affordable Care Act

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.


You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Selection Criteria

Taxable Entity

Enter, or click  to select, a taxable entity.

Calendar Year

Enter the filing year for the 1094-C and 1095-C information returns.

Employee Selection Criteria

Use the fields in this group box to specify ranges of employee records that you want to include in the processing.

Employee

Range Type

Select the type of employee range to be included in the processing. You can select one of the standard range types (**All**, **Range**, **One**, **From Beginning**, and **To End**) or they may opt to run the process for a set of non-contiguous Employee IDs.

From the drop-down list, select the employee range option to include on this report. Valid options are:

- **All** - Select this option to include all employees in the process.
- **One** - Select this option to include only one employee in the process. Enter the employee in the **Start** field.
- **Range** - Select this option to include a range of employees in the process. The range begins with the employee entered in the **Start** field and it ends with the employee entered in the **End** field.
- **From Beginning** - Select this option to include the first employee up to the employee entered in the **End** field.
- **To End** - Select this option to include the employee entered in the **Start** field up to the last employee.

Start

Enter, or click  to select, the starting value for the employee range.

End

Enter, or click  to select, the starting value for the employee range.

Employee Non-Contiguous Range

Select this check box to select a non-contiguous range for employee selection. Use the Employee Non-Contiguous Range subtask to select the employees you would like to include in the processing.

Processing Option

Use the options in this group box to select the type of processing to perform.

Generate Files

Select this option to generate XML files for the selected employees.

Confirm Records as Accepted by the IRS

Select this option to mark the employee records that you have previously generated as IRS accepted. Records that are marked as IRS accepted will no longer be editable.

You must perform this process after the records have been successfully accepted to ensure concurrency between the Costpoint database records and the records that are accepted by the IRS.

Data File

File Type

From the drop-down list, select the type of transmission. Valid options are:

- **Production** - Select this option to transmit to the Production system
- **Test** - Select this option to transmit to the ACA Assurance Test System (AATS). You must perform a one-time communication test by selecting this **Test** option to create your XML file, submitting the test file and successfully retrieving a Receipt ID, which should display in the browser after the IRS receives your test.

CREATE 1094-C AND 1095-C DATA AND ELECTRONIC FILE

This field is available only when you select **Generate Files** as the processing option.

Transmission Type

From the drop-down list, select the type of transmission. Valid options are:

- ☐ Original
- ☐ Corrections
- ☐ Replacement

Filing Year Status

From the drop-down list, select whether you are generating the date for the current year or prior year. Valid options are:

- ☐ **Current Filing Year** - If you select this option, the calendar year must not be equal to the Processing Year minus two or more years. For example if processing year is 2017 for 2016 information returns, then calendar year must be 2016.
- ☐ **Prior Filing Year** - If you select this option, the calendar year must be equal to the Processing Year minus two or more years. For example if processing year is 2017, then calendar year must be 2015 or earlier.

This drop-down list is available only when you select **Generate Files** as the processing option.

Receipt ID

Enter the receipt ID that was returned by the IRS when you submitted your original file. This field is required if the Transmission Type is **Replacement** or **Corrections**.

Type of Data Correction

If **Transmission Type** is set to **Corrections**, from the drop-down list, select which data file needs to be corrected. Valid options are:

- ☐ 1094-C
- ☐ 1095-C

Processing Corrections


If only 1094-C needs a correction file, select **1094-C** in the **Type of Data Correction** field. The Manifest file and the data file will be generated for correction transmission of 1094-C.

If only 1095-C needs a correction file, select **1095-C** in the **Type of Data Correction** field. The Manifest file and the data file will be generated for correction transmission of 1095-C.

If both 1094-C and 1095-C have corrections, complete the following steps:

1. Generate 1094-C correction files by selecting **1094-C** in the **Type of Data Correction** field.
2. Generate 1095-C correction files by selecting **1095-C** in the **Type of Data Correction** field.
3. Perform the following two transmissions to the IRS:
 - ☐ First, transmit the 1094-C correction files (files in Step 1). This includes the Manifest file and the data File with 1094-C data only.
 - ☐ Second, transmit the 1095-C correction files (files in Step 2). This includes the Manifest field and the data file with both 1094-C and 1095-C data.

Generation ID

Enter, or click  to select, the generation ID of the records to be confirmed as IRS accepted. This is the data file generation key created for each time an electronic file is created for 1094-C and 1095-C transmission. This ID is used when you run the screen process with the **Confirm Records as Accepted by the IRS** option selected on the **Processing Option** group box.

Transmitter Contact Information

This group box contains details about the contact person for the transmission. The default field values come from the [Manage 1094-C Data](#) screen. The fields on this group box are available only when you select **Generate Files** as the processing option.

First name

Enter the first name of the contact person for this transmission.

Middle Name

Enter the middle name of the contact person for this transmission.

Last Name

Enter the last name of the contact person for this transmission.

Suffix

Enter the suffix of the contact person for this transmission.


Telephone Number

Enter the telephone number of the contact person for this transmission.

File Options

File Location

Enter the location of the file you are creating. There are two ways to do this:

In the **File Location** field, enter, or click  to select, the alternate file location where you want to store the export file. Alternate file locations are set up on the Manage Alternate File Locations screen.

or

Leave the **File Location** field blank. When you execute this application, the export file is saved to the Costpoint database. Use the Export Files application to retrieve it and save it to a location on the network.

This field is available only when you select **Generate Files** as the processing option.

Transmitter Control Code (TCC)

Enter the code issued by the IRS to the transmitter. This field is available only when you select **Generate Files** as the processing option.

Subtask

Subtask	Description
Employee Non-Contiguous Ranges	Select this link to enter employee ranges that will be included in the processing.

Create the 1094-C and 1095 -C Electronic File

Click  and select one of the following options to create the XML file.

- **Create 1094-C and 1095-C Electronic File** — Create the XML file to submit.
- **Batch Create 1094-C and 1095-C Electronic File** — Specify a time and date to create the 1094-C and 1095-C XML file to submit.

PRINT 1094-CS

Use this screen to print 1094-C reports for taxable entities as part of the IRS reporting requirements for Applicable Large Employers (ALE).

For more information on filing Form 1094-C, please refer to IRS Instructions for Forms 1094-C and 1095-C: <https://www.irs.gov/instructions/i109495c/ar01.html>.

Related Information

[Affordable Care Act Overview](#)

[Setting Up Affordable Care Act Data](#)

[Generating Affordable Care Act Reports](#)

[Create 1094-C and 1095-C Data](#)

[Create 1094-C and 1095-C Electronic File](#)

[Print 1095-C Records](#)

Location


- ☐ People
- ☐ Benefits
- ☐ Affordable Care Act

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Calendar Year

Range Type

This field always displays the value **ONE**.

Start

Enter the 4-digit calendar year for which 1094-C data will be generated.

Taxable Entity

Range Type


From the drop-down list, select the type of taxable entity range to be included in the processing. You can select one taxable entity for processing or you can run the process for all Taxable Entity IDs within the Login Company.

The screen process will include Employees linked to the specified taxable entity.


Valid options are:

- **All** - Select this option to include all taxable entities in the process.
- **One** - Select this option to include only one taxable entity in the process. Enter the taxable entity in the **Start** field.
- **Range** - Select this option to include a range of taxable entities in the process. The range begins with the taxable entity entered in the **Start** field and ends with the taxable entity entered in the **End** field.
- **From Beginning** - Select this option to include the first taxable entity up to the taxable entity entered in the **End** field.
- **To End** - Select this option to include the taxable entity entered in the **Start** field up to the last taxable entity.

Start

If you selected **One**, **Range**, or **To End** as the taxable entity **Range Type**, enter, or click  to select, the starting taxable entity for the range you want to include in the process. The screen will generate 1094-C data for employees linked to taxable entities within the taxable entity range.

End

If you selected **Range** or **From Beginning** as the taxable entity **Range Type**, enter, or click  to select, the ending taxable entity for the range you want to include in the process. The screen will generate 1094-C data for employees linked to taxable entities within the taxable entity range.

Taxable Entity Non-Contiguous Range

Select this check box to select a non-contiguous range for Taxable Entity selection. Use the Taxable Entity Non-Contiguous Range subtask to select the range of items that you would like to include in the processing.

Options

1094-C Type

Regular

Select this option for the initial generation and submission of a 1094-C

Correcting

Select this option if you are correcting information on the Authoritative Transmittal (identified on Part I, line 19, as the Authoritative Transmittal, which must be filed for each employer reporting aggregate employer-level data for all full-time employees of the employer). You must file a standalone fully completed Form 1094-C including the correct information and enter an "X" in the **Corrected** check box. Do not file a return correcting information on a Form 1094-C that is not the Authoritative Transmittal.

Correcting 1095-Cs

Select this option if you are generating a 1094-C to be submitted with corrected 1095-C forms

[Do not use this option if you are correcting information on the Authoritative Transmittal.](#)

File a Form 1094-C Transmittal (Do not mark the **Corrected** check box on the Form 1094-C) with corrected Forms 1095-C. If you select the **Correcting 1095-Cs** check box, Part I, fields 1-16 and 18 will be populated on the 1094-C. All other fields will be left blank.

Number of Correcting 1095-C Forms Being Submitted

Enter the number of correcting 1095-C forms being submitted. This value populates line 18 of the printed 1094-C.

Print Test Pattern

Select this check box to print a test pattern of the report.

Truncate Payee Identification numbers (Employer)

Select this check box if the Employer Identification Number (EIN) should be truncated on the printed 1094-C.

Final regulations regarding an IRS truncated taxpayer identification number

The IRS issued final regulations (Internal Revenue Bulletin 2014-31) on July 15, 2014 that allow you to truncate payee identification numbers on statements. The goal of these regulations is to reduce the risk of identity theft that may stem from including a taxpayer's entire identifying number on a payee statement.

The regulations allow you to replace the first five digits of the nine digit number with asterisks (*) or X's for the following:

- Payee's social security number (SSN)
- Individual taxpayer identification number (ITIN)
- Employer identification number (EIN)
- Adoption taxpayer identification number (ATIN) on most payee statements

A payee is any person who is required to receive a copy of the information set forth on an information return by the filer of the return. For some forms, the term payee will refer to beneficiary, borrower, debtor, insured, participant, payer, policyholder, recipient, shareholder, student, or transferor.


You can truncate a payee's identification number on the statements (including substitute and composite substitute statements) you give to them in paper or electronic format (usually designated Copy B). This includes the Form 1098 series (except Form 1098-C), Form 1099 series, Form 5498 series and Form 1095-C.

If you truncate an identification number on Copy B, the other copies you give the payee should also include the truncated number.

Subtask

Subtask	Description
Taxable Entity Non-Contiguous Ranges	Select this link to enter taxable entity ranges that will be included in the processing.

Print 1094-Cs Report

Click  and select one of the following options

- **Print 1094-Cs Report** —Click to print 1094-Cs to provide to the IRS.
- **Batch Mode Print 1094-Cs Report** — Click to schedule a date and time to print the reports.

PRINT 1095-CS

Use this screen to print 1095-Cs that will be provided to IRS and to full-time employees which is required under the IRS Affordable Care Act.

According to the IRS, employers must send employees their 1095-C forms by the end of January each year. Information must be sent to the IRS by the end of February if paper filed, or by the end of March if the forms are filed electronically.

Employers with fewer than 250 forms to send to the IRS can file paper 1095-C forms, accompanied by a paper 1094-C. They can also file electronically. Employers with 250 or more forms must transmit the information electronically. If you have more than 250 employees, use the [Create 1094-C and 1095-C Electronic File](#) screen for reporting.

When printing 1095-Cs, either for submission to the IRS or for providing to employees, you need to perform a separate run to print the 1095-C continuation form (Page 2 – Additional Dependents) for employees with more than six (6) dependents. To print the continuation form, select the **Page 2 (More than 6 dependents)** option when you run the printing process.

Related Information

[Affordable Care Act Overview](#)

[Setting Up Affordable Care Act Data](#)

[Generating Affordable Care Act Reports](#)

[Create 1094-C and 1095-C Data Reports](#)

[Create 1094-C and 1095-C Electronic File](#)

[Print 1094-C Records](#)

[Location](#)


- People
- Benefits
- Affordable Care Act

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Selection Type

From the unlabeled drop-down list, select the field that the application will use as basis for the selecting 1095-Cs for printing. Your selection in this drop-down list will be the default option in the **1st Sort** drop-down list. Valid options are:

- **Employee Name** - Select this option to select 1095-Cs by employee name.
- **Employee ID** - Select this option to select 1095-Cs by employee ID.
- **Social Security Number** - Select this option to select 1095-Cs by employee social security number
- **Home Organization** - Select this option to select 1095-Cs by the employee home organization
- **Mailing Address State** - Select this option to select 1095-Cs by employee mailing address state. If this option is selected, the **State/Province** field must be populated on the [Manage 1095-Cs](#) screen in order for the employee's 1095-C to be selected for printing. The 1095-Cs for employees without Mailing Address States will not be included.
- **Mailing Address Postal Code** — Select this option to select 1095-Cs by employee mailing address postal code. If this option is selected, the **Country and ZIP or Postal Code** field must be populated on the Manage 1095-Cs screen in order for the employee's 1095-C to be selected for printing. The 1095-Cs for employees without mailing address postal codes will not be included.
- **Locator Code** — Select this option to select 1095-Cs by employee locator code. If this option is selected, the **Locator Code** field must be populated on the Manage Employee Information screen for each employee that has a 1095-C. The 1095-Cs for employees without locator codes will not be included.

Range Type


From the drop-down list, select the range option for 1095-Cs that will be included on this report. Valid options are:

- **All** - Select this option to include all employees in the process.
- **One** - Select this option to include only one employee in the process. Enter the taxable entity in the **Start** field.
- **Range** - Select this option to include a range of employees in the process. The range begins with the employee entered in the **Start** field and ends with the employee entered in the **End** field.
- **From Beginning** - Select this option to include the first employee up to the employee entered in the **End** field.
- **To End** - Select this option to include the employee entered in the **Start** field up to the last employee.

Start

Enter, or click  to select, the starting value for the selection of employees.

End

Enter, or click  to select, the ending value for the selection of employees.

Employee Name/Employee/Social Security Number/Home Organization/Mailing Address State/Mailing Address Postal Code/Locator Code Non-Contiguous Range

Select this check box to select a non-contiguous range for employee name/employee/social security number/home organization/ mailing address state/ mailing address postal code/locator code selection. Use the corresponding non-contiguous range subtask to select the range of data that you would like to include in the processing.

Taxable Entities

Range Type

From the drop-down list, select the type of taxable entity range to be included in the processing. You can select one taxable entity for processing or you can run the process for all Taxable Entity IDs within the Login Company.


The screen process will include Employees linked to the specified taxable entity.

Valid options are:


- **All** - Select this option to include all taxable entities in the process.

- **One** - Select this option to include only one taxable entity in the process. Enter the taxable entity in the **Start** field.
- **Range** - Select this option to include a range of taxable entities in the process. The range begins with the taxable entity entered in the **Start** field and ends with the taxable entity entered in the **End** field.
- **From Beginning** - Select this option to include the first taxable entity up to the taxable entity entered in the **End** field.
- **To End** - Select this option to include the taxable entity entered in the **Start** field up to the last taxable entity.

Start

If you selected **One**, **Range**, or **To End** as the taxable entity **Range Type**, enter, or click  to select, the starting taxable entity for the range you want to include in the process. The screen will generate 1095-C data for employees linked to taxable entities within the taxable entity range.

End

If you selected **Range** or **From Beginning** as the taxable entity **Range Type**, enter, or click  to select, the ending taxable entity for the range you want to include in the process. The screen will generate 1095-C data for employees linked to taxable entities within the taxable entity range.

Taxable Entity Non-Contiguous Range

Select this check box to select a non-contiguous range for Taxable Entity selection. Use the Taxable Entity Non-Contiguous Range subtask to select the range of items that you would like to include in the processing.

Calendar Year

Range Type

This field always displays the value **One**.

Start

Enter the 4-digit calendar year for which 1095-C data will be generated.

Options

1095-C Type

Regular

Select this option to print **Regular** type 1095-C data.

Correcting

Select this option to print **Correcting** type 1095-C data.

Void

Select this option to print **Void** type 1095-C data.

1095-C Page

Page 1

Select this option to print page 1 of Form 1095-C.

For employees with more than six dependents, you need print the 1095-C continuation form by performing another print run with the **Page 2 (More than 6 dependents)** option selected.

Page 2 (More than 6 dependents)

Select this option to print page 2 of Form 1095-C for any employees with more than six dependents.

Print Test Pattern

Select this check box to print a test pattern of the report.

Truncate Payee Identification numbers (Employer and Employees)

Select this check box if the Employer Identification Number (EIN) should be truncated on the printed 1095-C.

Final regulations regarding an IRS truncated taxpayer identification number

The IRS issued final regulations (Internal Revenue Bulletin 2014-31) on July 15, 2014 that allow you to truncate payee identification numbers on statements. The goal of these regulations is to reduce the risk of identity theft that may stem from including a taxpayer's entire identifying number on a payee statement.

The regulations allow you to replace the first five digits of the nine digit number with asterisks (*) or X's for the following:

- Payee's social security number (SSN)
- Individual taxpayer identification number (ITIN)
- Employer identification number (EIN)
- Adoption taxpayer identification number (ATIN) on most payee statements

A payee is any person who is required to receive a copy of the information set forth on an information return by the filer of the return. For some forms, the term payee will refer to beneficiary, borrower, debtor, insured, participant, payer, policyholder, recipient, shareholder, student, or transferor.

You can truncate a payee's identification number on the statements (including substitute and composite substitute statements) you give to them in paper or electronic format (usually designated Copy B). This includes the Form 1098 series (except Form 1098-C), Form 1099 series, Form 5498 series and Form 1095-C.

If you truncate an identification number on Copy B, the other copies you give the payee should also include the truncated number.

Report Options

1st Sort

This field displays the selection type in the **Selection Ranges** group box by default. This is the report's primary sort order. From this drop-down list, select the basis for the primary sorting of the printed 1095-Cs. Valid options are:

- **Taxable Entity** - Select this option to sort 1095-Cs by Taxable Entity ID. If you select this option, you have following options in the **2nd Sort** drop-down list:
 - Employee Name
 - Employee ID
 - None.
- **Employee Name** — Select this option to sort 1095-Cs by employee name. If you select this option, you will have no options in the **2nd Sort** drop-down list.
- **Employee ID** — Select this option to sort 1095-Cs by employee ID. If you select this option, you will have no options in the **2nd Sort** drop-down list.
- **Social Security Number** — Select this option to sort 1095-Cs by Social Security Number. If you select this option, options in the **2nd Sort** drop-down list.
- **Home Organization** — Select this option to sort 1095-Cs by employee home organization assigned to the employees in Manage Employee Salary Information screen. If you select this option, you have the following options in the **2nd Sort** drop-down list:
 - Employee Name
 - Employee ID
 - None
- **Mailing Address State** — Select this option to sort 1095-Cs by employee mailing address state. The **State/Province** field must be populated in the Manage Employee Information screen to sort by this option. 1095-Cs for employees without mailing address state codes will be printed first. If you select this option, you have the following options in the **2nd Sort** drop-down list.
 - Employee Name

- Employee ID
- None
- **Mailing Address Postal Code** — Select this option to sort 1095-Cs by employee mailing address postal code. The **Postal Code** field must be populated in the Manage Employee Information screen to sort by this option. 1095-Cs for employees without mailing address postal codes will be printed first. If you select this option, you have the following options in the **2nd Sort** drop-down list.
 - Employee Name
 - Employee ID
 - None
- **Locator Code** — Select this option to sort 1095-Cs by employee Locator Code. The **Locator Code** field must be populated in the Manage Employee Information screen to sort by this option. 1095-Cs for employees without locator codes will be printed first. If you select this option, you have the following options in the **2nd Sort** drop-down list.
 - Employee Name
 - Employee ID
 - None

2nd Sort

From this drop-down list, select the option to determine the secondary order in which your 1095-Cs print. The available options in this field depend on your selection on the **1st Sort** field. Valid options are:

- **Employee Name** — Select this option to sort by employee name.
- **Employee ID** — Select this option to sort by employee ID.
- **None** — If there is no secondary sort, this option displays in this field. This occurs if you select **Employee Name**, **Employee ID**, or **Social Security Number** in the **1st Sort** drop-down list.

Orientation

Portrait (Employer/Employee Copy)

Select this option to print the report in portrait mode. Use this when printing 1095-C reports that will be provided to employees.

Landscape (IRS Copy)


Select this check box to print the report in landscape mode. Form 1095-C that will be submitted to the IRS needs to be in landscape orientation.

Subtasks

Subtask	Description
Employee Name Non-Contiguous Ranges	Select this link to enter employee name ranges that will be included in the processing.
Employee Non-Contiguous Ranges	Select this link to enter employee ranges that will be included in the processing.
Social Security Number Non-Contiguous Ranges	Select this link to enter Social Security Number ranges that will be included in the processing.
Organization Non-Contiguous Ranges	Select this link to enter organization ranges that will be included in the processing.

Mailing Address State Non-Contiguous Ranges	Select this link to enter mailing address state ranges that will be included in the processing.
Mailing Address Postal Code Non-Contiguous Ranges	Select this link to enter postal code ranges that will be included in the processing.
Locator Code Non-Contiguous Ranges	Select this link to enter locator ranges that will be included in the processing.
Taxable Entity Non-Contiguous Ranges	Select this link to enter taxable entity ranges that will be included in the processing.

Print 1095-Cs Report

Click  and select one of the following options

- **Print 1095-Cs Report** —Click to print 1095-Cs to provide to the IRS and to full-time employees.
- **Batch Mode Print 1095-Cs Report** — Click to schedule a date and time to print the reports.