

What New in Costpoint 7.1.1 People Domain

7.1.1 People Enhancements

- Multi-Currency Labor
- Multi-Currency Leave
- Talent Management Integration
- PayChex Integration
- Affordable Care Act Support

Costpoint 7.1.1

Multi-Currency Labor

Overview

- Prerequisites
 - Must be licensed for Multicurrency
- Settings
 - Turn on/off feature
 - Define accrued salary accounts by transaction currency
- Employee
 - Associate currency and rate group to employee
 - Capture rate/salary based on employee currency
 - Ability to maintain via screen or preprocessor
- Pay Types
 - Ability to provide premium amounts in by transaction currency
- Timesheets
 - Timesheets are costed based on employee currency and rate group
- Processing/Reporting
 - Option to include functional and transactional currency info on reports
 - Posts Multicurrency transaction to GL Detail and timesheet history tables

Settings

- Allows you to enable/disable feature

Configure Labor Settings [New] [Delete] [1 of 1 Existing]

Employee Options | **Timesheet Options**

Enable Union Functionality

- Union Fringe Ceilings by Local
- Enable Wage Determination
- Enable Batch
- Use Standard Rates
Standard Variance ACCOUNT:
- Use Reference Date in Correcting and Labor-Only timesheets
- Allow edit of timesheet line GLC
- Allow edit of timesheet Workers' Compensation Code
- Require Labor Location
- Enable Pay Type restrictions
- Enable Multi-Currency Functionality**

Effective Bill Date Options

Default Effective Bill Date *

Use Reference Date in Correcting timesheets

Validation of Labor-Only Timesheets

Error if Net Hours not equal to zero

Warning if Net Hours not equal to zero

Salary Proration

Prorate Calculation Method

- Days per Cycle
- Do not prorate
- Prorate Hired/Terminated Employees only

Manufacturing Order Timesheet Lines

Organization Default Method *

ACCOUNT Validation Method *

ACCOUNT Default Method *

Functional Currency Timesheet Posting

Accrued Salaries ACCOUNT *

Shop Floor Time

Correcting Timesheet Date Method

[Corporate Labor Settings](#) | [Overtime Settings](#) | [Additional Accrued Salaries ACCOUNTS by Currency](#)

Settings

- Define accrued salary accounts by transaction currency

The screenshot shows two overlapping windows from a software application. The top window is titled 'Configure Labor Settings' and has two tabs: 'Employee Options' and 'Timesheet Options'. The 'Employee Options' tab is active. It contains several input fields and a radio button group. The 'Validate Social Security Number' checkbox is checked. The 'Number of Work Hours in the Year' is set to 2080, 'Minimum Hourly Rate' is 7.5000, and 'Number of Months in Review Cycle' is 12. The 'Employee Class Validation Method' has three radio buttons: 'Error' (selected), 'Warning', and 'No validation'. The 'Timesheet Line Defaults' section has a 'Timesheet Cycle' field, a 'Pay Type' field set to 'R', a checked 'Require Default Workers' Compensation Code' checkbox, and a 'Workers' Compensation' field set to '9102A'. The bottom window is titled 'Additional Accrued Salaries ACCOUNTS by Currency' and contains a table with the following data:

Transaction Currency *	Transaction Currency Name	Accrued Salaries ACCOUNT *	Accrued Salaries ACCOUNT Name
AOA	Angola Kwanza	02041-AOA	ACCR SALARIED PAY - AOA
ATS	Austrian Schilling	02041-007	ACCRUED SALARIES - ATS
AUD	Australian Dollar	02041-003	ACCR SALARIED PAY - AUD
CAD	Canadian Dollar	02041-002	ACCR SALARIED PAY - CAD
CHF	Swiss Franc	02041-005	ACCRUED SALARIES - CHF
CNY	China Renminbi	02041-006	ACCRUED SALARIES - CNY

A red arrow points from the 'Additional Accrued Salaries ACCOUNTS by Currency' window to a red-bordered box at the bottom of the screen containing the text 'Additional Accrued Salaries ACCOUNTS by Currency'. Other text at the bottom includes 'Corporate Labor Settings' and 'Overtime Settings'.

Employees

- Associate currency and rate group to employee
- Hourly/Salary/Annual amounts based on currency
- Maintain via screen or employee preprocessor

The screenshot displays the 'Manage Employee Salary Information' web application. The interface includes a navigation bar at the top with the breadcrumb 'People > Employee > Basic Employee Information > Manage Employee Salary Information'. Below this is a search bar for 'Employee' and a 'Salary Details' section with tabs for 'Salary Info', 'HR Information', and 'Comments'. The 'Salary Info' tab is active, showing a grid of input fields for various salary-related parameters. A red box highlights the 'Rate Group' and 'Currency' fields at the bottom of the form.

Field	Value
Effective Date *	[]
End Date	[]
Work Hours In Year	2080
Hourly Amount	[]
Payroll Salary Amount	[]
Annual Amount	[]
Percent Of Increase	[]
Estimated Annual Hours	[]
Standard Hourly Rate	[]
Employee Class	[]
Employee Type	-None-
Rate Type	-None-
FLSA Classification	Non-Exempt
Labor Group	[]
Labor Location	[]
Work Schedule	[]
GLC *	[]
PLC	[]
Overtime State *	[]
Time Collection	[]
Home Organization *	[]
HR Organization	[]
Detail Job Title	[]
Security Organization	[]
Manager	[]
Personnel Action 1	[]
Personnel Action 2	[]
Personnel Action 3	[]
REF ONE	[]
REF TWO	[]
Rate Group	[]
Currency	USD

Pay Types

- Ability to provide premium amounts in by transaction currency

Identification [New] [Copy] [Delete] [138 of 181 Existing] [Table] [Query]

Pay Type Code * Description * Factor *

Details

Additional Calculations Based on an Amount

Add pay type amount to timesheet line
 Multiply hours times pay type amount
 Multiply hours times pay type amount times factor

Amount *

Employee Eligibility

Exempt
 Non-Exempt
 Salaried

Overtime Premium Recasting

Eligible for overtime premium recasting

Identification > Transaction Currency Overrides [New] [Copy] [Delete] [Query]

<input checked="" type="checkbox"/>	Transaction Currency *	Transaction Currency Name	Override Factor	Additional Calculation Method *	Override Amount
<input checked="" type="checkbox"/>	CNY	China Renminbi	1.4000	Multiply hours times pay type amount	100.0000
<input checked="" type="checkbox"/>	FRF	French Franc	1.4000	Multiply hours times pay type amount	100.0000
<input checked="" type="checkbox"/>	SGD	Singapore Dollar	1.4000	Multiply hours times pay type amount	100.0000

Severance
 Federal-non-taxable sick pay wages

Recalculate this Pay Type
 Not applicable (do not include or recalculate)

Transaction Currency Override

Timesheet

- Costs timesheets based on employee currency and rate group
- Ability to cost timesheets via screen, preprocessor, or T&E interface

Browse Applications | People > Labor > Timesheet Entry/Creation > **Manage Timesheets**

Identification | New | Copy | Delete | 1 of 1 New | Table | Query | X

Date * | Employee * | Type * Regular | Sequence * 1

Timesheet Header | Entry Information

Hours & Accounting Period | Employee Information | Timesheet Line Totals | Timesheet Status

Regular Hours | Other Hours | Total Hours | Fiscal Year | Period | Subperiod

Leave Computed | Labor Posted | Payroll Computed | Payroll Posted | Reversal Timesheet

Reference Timesheet Information | Reference Date | Reference Sequence

Standard Variance | Prorate | **Exchange Rates**

Transaction Currency: U. S. Dollar
Rate Group: |
Transaction Currency to Functional Currency Exchange Rate Info
Rate Date: 01/09/2014 | Rate: 0.0000000 | Freeze Rate:
Trans to Func: 0.0000000
N/A: 0.0000000

Find Rates | Apply

Line Type	Line Number	Line Date	Project	Account	Organization	Pay Type	Hours	Trans Amount	Labor Cost/Func Amount	GLC
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Processing\Reporting

- Option to include functional and transactional currency info on reports
- Posts Multicurrency transaction to GL Detail and timesheet history tables

Costpoint 7.1.1

Multi-Currency Leave

Overview

- Prerequisites
 - Must be licensed for Multicurrency
- Settings
 - Control how currency and exchange rate is determined for accruals
 - Allow configuration of monthly block grant with different leave cycle
 - Define Leave Type accrued salary accounts by transaction currency
- Initialization
 - Ability to set beginning balances based on transaction currency
- Processing\Reporting
 - Compute leave based on employee currency
 - Multicurrency posting to GL detail and leave history tables
 - Display transactional amounts on reports
- International
 - Provide ability to provide T&E with leave balance and accruals in days
 - Ability to do monthly block grant when leave cycle not monthly

Settings

- Configure whether the currency and exchange rate shall be based on the first or last day of the leave period.
- Needed if employee currency changes during leave period

Leave Options

Default Leave Cycle
Default Leave Cycle
 Export Paid-Out Leave to Deltek Time and Expense

Months of Service Calculation
 Leave Period Start Date
 Leave Period End Date

Leave Payout: Final Accrual Validation Type
 Require Final Leave Period Accrual
 Warn if Final Leave Period Accrual Not Computed
 No Validation

Posting Methods

Deferred Leave Posting Method
 Accrued
 Available

Leave Posting Method
 Accrual to Balance Sheet Level of Home Org and Expense to Home Organization
 Accrual and Expense to Home Organization
 Accrual and Expense to Balance Sheet Level of Home Organization

Leave Statement Line Number Description

Line	Short Desc	Short Desc	Short Desc	Short Desc			
Line 1	<input type="text" value="Vac"/> <input type="text" value="Vacation"/>	Line 3	<input type="text" value="Pers"/> <input type="text" value="Personal"/>	Line 5	<input type="text" value="Jury"/> <input type="text" value="Jury Duty"/>	Line 7	<input type="text" value="FMLA"/> <input type="text" value="FMLA"/>
Line 2	<input type="text" value="Sick"/> <input type="text" value="Sick"/>	Line 4	<input type="text" value="Hol"/> <input type="text" value="Holiday"/>	Line 6	<input type="text" value="Mil"/> <input type="text" value="Military"/>	Line 8	<input type="text" value="REGR"/> <input type="text" value="regression"/>

Monthly Block-Grant Option
Accrual Date Basis First day of month
 Last day of month

Reconcile Leave Balances
Reconciliation Method Employee
 Account

Multi-Currency
Date Basis First day of leave period
 Last day of leave period

Settings

- Define leave accrual accounts by transaction currency
- Accrual accounts must be unique across currencies
- Expense Accounts can be duplicated

The screenshot shows the 'Manage Leave Types' configuration window. The 'Transaction Currency' field is highlighted with a red box. Below the main form, a table titled 'Additional Transaction Currencies' is also highlighted with a red box.

Transaction Currency *	Transaction Currency Name	Expense Account *	Expense Project	Accrual Account

Initialization

- Ability to enter transaction amounts for accrued leave, deferred leave, and lost leave for an employee's Leave Year beginning balances.

Browse Applications | People > Employee > Employee Leave Information > **Manage Leave Beginning Balances**

→ Identification [New] [Copy] [Delete] [1 of 1 New] [Table] [Query]

Employee * [] []

Leave Details

Leave Type * [] Leave Payout Leave

Leave Year * []

Beginning Balances

Hours	[]	Deferred Hours	[]	Lost Hours	[]
Transaction Amount	[]	Deferred Transaction Amount	[]	Lost Transaction Amount	[]
Amount	[]	Deferred Amount	[]	Lost Amount	[]

Balance Transfer Information

New Leave Type [] Leave Type Transferred

New Leave Code []

Leave Period End Date []

[Exchange Rates](#)

Processing\Reporting – Accrual

- When leave is computed for the employee, the transaction amount will be based on the accrual rules set up for the Leave Type
- The Exchange Rate will be based on the employee's Currency & Rate Group as of the first or last day of the leave period being computed.
- After computing, leave accruals can be reviewed in the Manage Leave Edit Table screen or by running the Leave Accrual Report

★ 10 Browse Applications People > Leave > Leave Processing > **Compute Leave Accruals**

➔ Identification New Copy ▼ Delete 1 of 1 New Table Query ▼

Parameter ID * Description *

Selection Ranges

	Range	Start			
Leave Cycle *	One		Leave Period End Date		Standard Leave Hours

Options

All Employees

[Compute Leave Accrual](#)

Processing\Reporting – Posting

- Accrued leave will be posted to the General Ledger, Employee Balances, and Employee Leave History tables
- Any edits or corrections to posted leave will need to be done through manual entry of the adjustments into the Leave Edit table
- Used leave is entered on timesheets and will therefore be posted in the Post Timesheets application

The screenshot shows the 'Compute Leave Accruals' application interface. The breadcrumb navigation is 'People > Leave > Leave Processing > Compute Leave Accruals'. The interface is divided into three main sections: Identification, Selection Ranges, and Options.

Identification: Contains two text input fields: 'Parameter ID *' and 'Description *'. Above these fields are buttons for 'New', 'Copy', 'Delete', and navigation controls. A status bar indicates '1 of 1 New'.

Selection Ranges: Contains several input fields: 'Leave Cycle *' (with a dropdown menu showing 'One'), 'Start', 'Leave Period End Date', and 'Standard Leave Hours'.

Options: Contains a checked checkbox labeled 'All Employees'.

At the bottom right of the application window, there is a button labeled 'Compute Leave Accrual'.

Processing\Reporting – Gain\Loss

- Unrealized and Realized Gains and Losses
 - This existing application can be used to calculate the unrealized gain/loss on the value of the Leave Accrual liability account
 - Users will need to do their own entries each month to revalue the beginning fiscal year balance for Accrued Leave (and any other balance sheet accounts revalued by that G/L process)
 - The Month-End Revaluation Entry is a reversing JE, so will be reversed in following period, and therefore have no lasting effect. A new revaluation will be done in the following month.
 - Upon posting used leave, the realized gain or loss will be determined based on the average exchange rate for the employee's leave balance. The average exchange rate is the average rate applied to the beginning balance and the accrued leave or the deferred leave.

Processing\Reporting - Transfers

- The necessity to transfer leave balances can arise from any one or more of the following:
 - Employee's Home Organization changes, causing the need for transfer of his leave liability
 - Employee's Currency changes, causing the need to transfer the liability to a new Account/Organization
 - Employee's Leave Type changes, causing the need to transfer the liability to a new Account/Organization. An employee's Leave Type may change if the client opts to limit Costpoint setup to one Transaction Currency per Leave Type. If the employee's Currency changes, the Leave Type must also change.
 - Used leave is posted via a correcting timesheet, where the timesheet's Currency is not the same as the employee's current Currency. The new Account/Organization liability will need to be adjusted

Internationalization – Block Grant

- Allow the client to specify whether the accrual shall be calculated on the first day of every month or the last day of every month (Only applies if not month leave cycle)

Leave Options

Default Leave Cycle Default Leave Cycle <input type="text" value="LEAV"/> <input type="button" value="Q"/> <input type="checkbox"/> Export Paid-Out Leave to Deltek Time and Expense	Months of Service Calculation <input checked="" type="radio"/> Leave Period Start Date <input type="radio"/> Leave Period End Date	Leave Payout: Final Accrual Validation Type <input type="radio"/> Require Final Leave Period Accrual <input checked="" type="radio"/> Warn if Final Leave Period Accrual Not Computed <input type="radio"/> No Validation
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Posting Methods

Deferred Leave Posting Method <input checked="" type="radio"/> Accrued <input type="radio"/> Available	Leave Posting Method <input checked="" type="radio"/> Accrual to Balance Sheet Level of Home Org and Expense to Home Organization <input type="radio"/> Accrual and Expense to Home Organization <input type="radio"/> Accrual and Expense to Balance Sheet Level of Home Organization
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Leave Statement Line Number Description

Line 1 <input type="text" value="Vac"/> <input type="text" value="Vacation"/>	Line 3 <input type="text" value="Pers"/> <input type="text" value="Personal"/>	Line 5 <input type="text" value="Jury"/> <input type="text" value="Jury Duty"/>	Line 7 <input type="text" value="FMLA"/> <input type="text" value="FMLA"/>
Line 2 <input type="text" value="Sick"/> <input type="text" value="Sick"/>	Line 4 <input type="text" value="Hol"/> <input type="text" value="Holiday"/>	Line 6 <input type="text" value="Mil"/> <input type="text" value="Military"/>	Line 8 <input type="text" value="REGR"/> <input type="text" value="regression"/>

Monthly Block-Grant Option Accrual Date Basis <input checked="" type="radio"/> First day of month <input type="radio"/> Last day of month	Reconcile Leave Balances Reconciliation Method <input checked="" type="radio"/> Employee <input type="radio"/> Account	Multi-Currency Date Basis <input checked="" type="radio"/> First day of leave period <input type="radio"/> Last day of leave period
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Internationalization – Work Days

- Add the ability to specify the number of leave hours which constitute one day of leave

Browse Applications | People > Leave > Leave Controls > Manage Leave Codes

Identification Leave Code * Description *

Options

Leave Type *

Payout Leave Code

Include Negative Balances in Leave Year Carryover

Report Leave to Employee in Days

Hours in Leave Day

Basis for Leave Deferral

Hire Date

Leave Hire Date

Days to Defer Leave Usage

Leave Based on Hours Worked

Leave Modifier

Based Hours Worked on Eligible Labor Locations

[Eligible Labor Locations](#) [Leave Table Details](#)

Leave Table Details New Copy Delete Form

<input checked="" type="checkbox"/>	Months of Service *	Compute Method *	Unit of Hours	Annual (C) Block Grant Date	One-Time (D) Block Grant Date	Accrual Rate *	Leave Period Ceiling *	Year Ceiling *

Ok

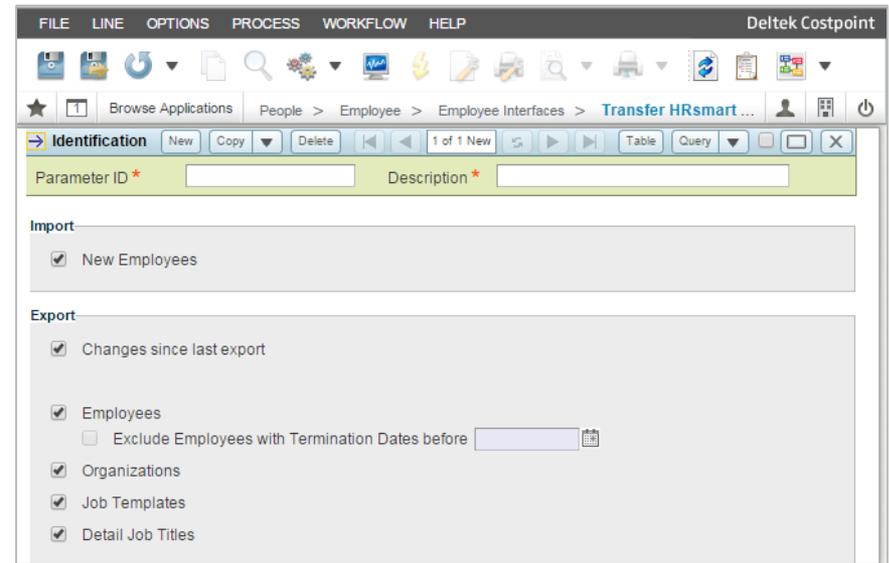
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**Talent Management
Integration**

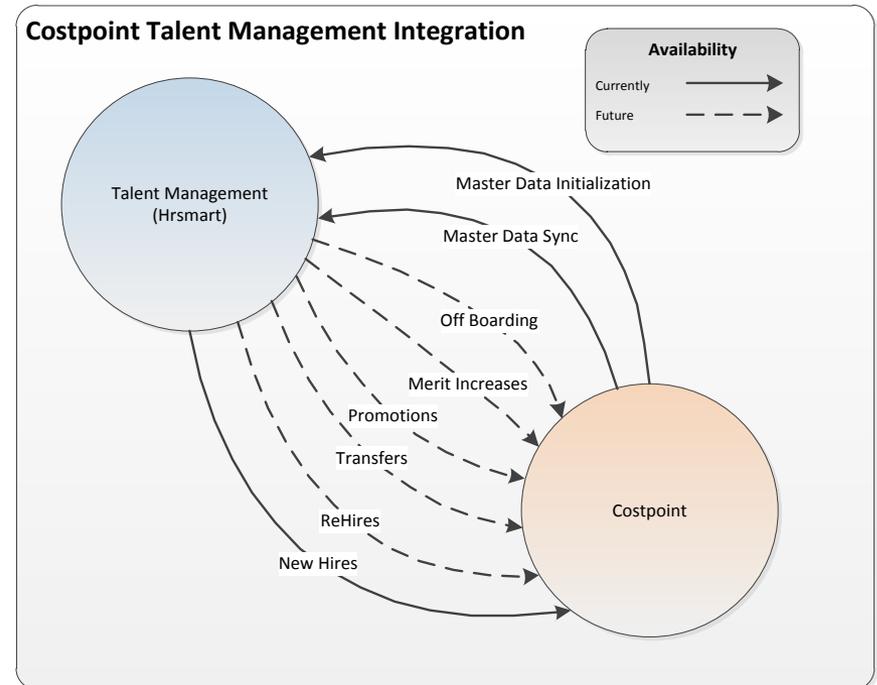
Overview

- Current Integration – Talent Acquisition
 - Bi Directional
 - Automate New Hire process
- Prerequisites
 - Deltek Costpoint 7.0.1 or 7.1.1
 - Deltek Talent Acquisition
 - Supports Costpoint on premise and SaaS (Foundations and Essentials)
 - Employee Self Service (ESS) is optional



Integration Use Cases

- Costpoint to HRsmart
 - Master Data Initialization
 - Master Data Synchronization
- HRsmart to Costpoint
 - New Hires (Currently Available)
 - Rehires (Future)
 - Transfers (Future)
 - Promotions (Future)
 - Merit Increases (Future)
 - Off Boarding (Future)

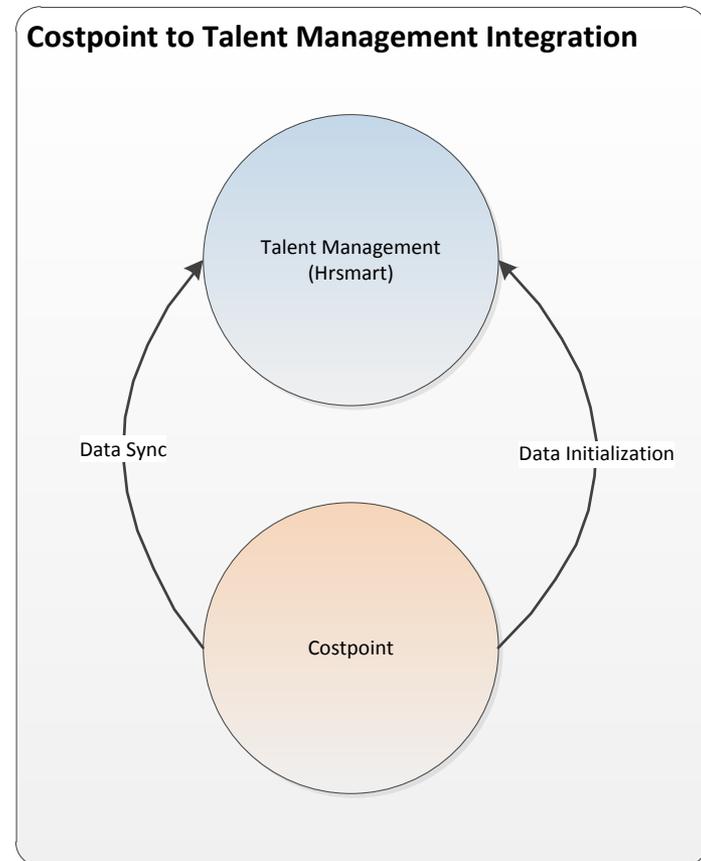


Costpoint → Talent Management

Integration

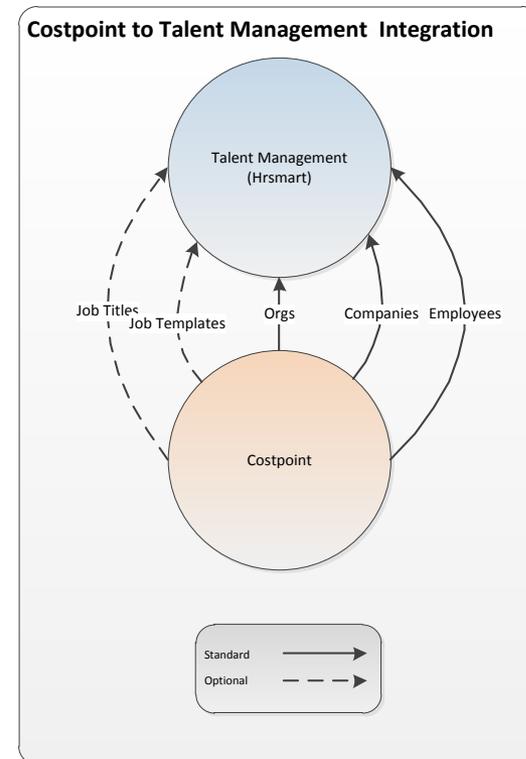
Overview

- Integration Types
 - Data Initialization (Data Dump)
 - Data Synchronization (Changes Only)
- Integration Execution
 - Execute on Demand
 - Scheduled
- Integration Method
 - New Costpoint App that Utilizes Talent Management API



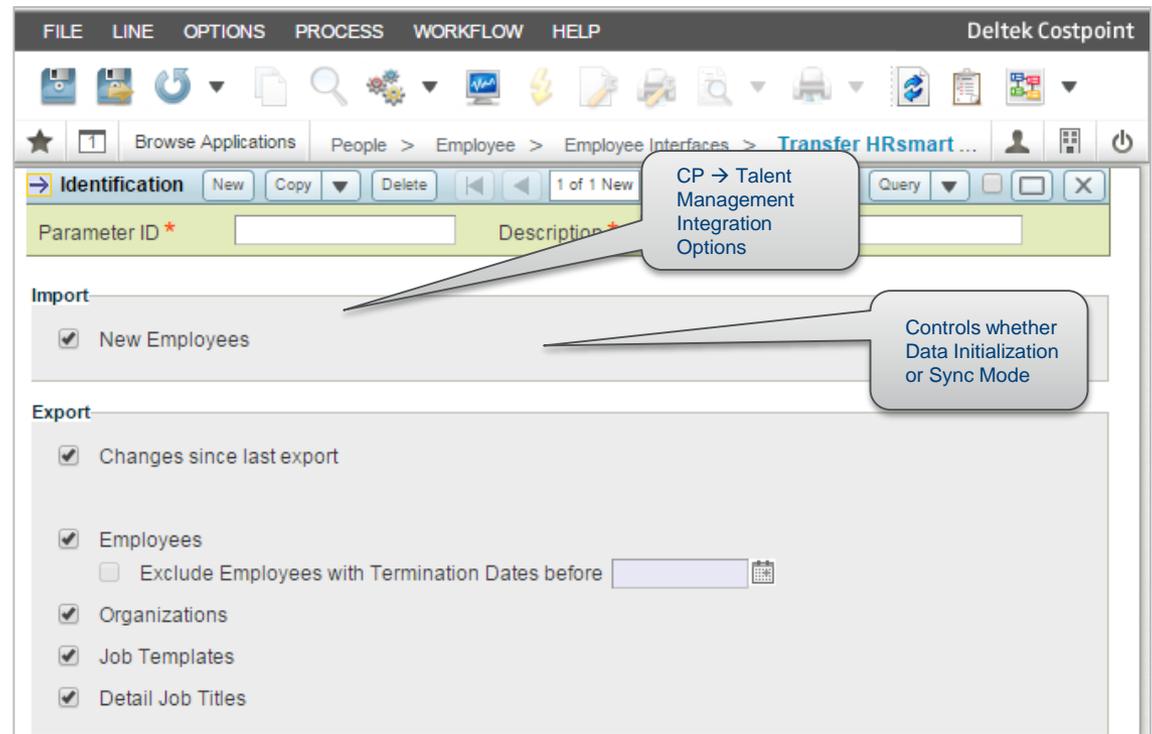
Data Mapping

- Data Mapping (CP to Talent Management)
 - Employees → Users
 - Company/Orgs → Company/Division/Department
 - Detail Job Titles → Job Profiles
 - Job Template → Job Template
- Job Templates provides additional employee defaulting options
- Job Titles only available if client has Costpoint HR



Talent Management Integration Application

- Transfer Talent Management Data (EMPHRSDAT) (New Application)
- Execute on Demand or Scheduled

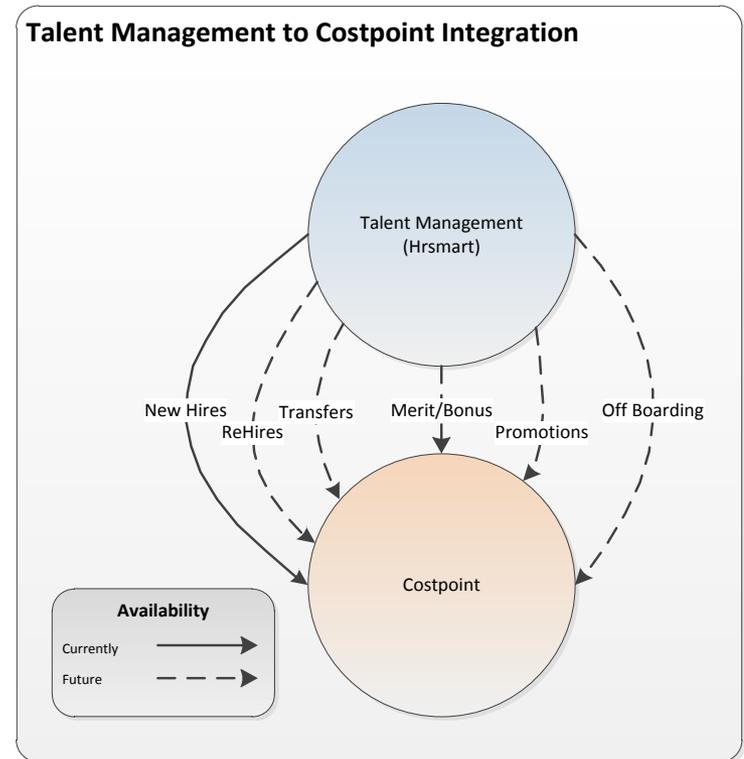


Talent Management to Costpoint

Integration

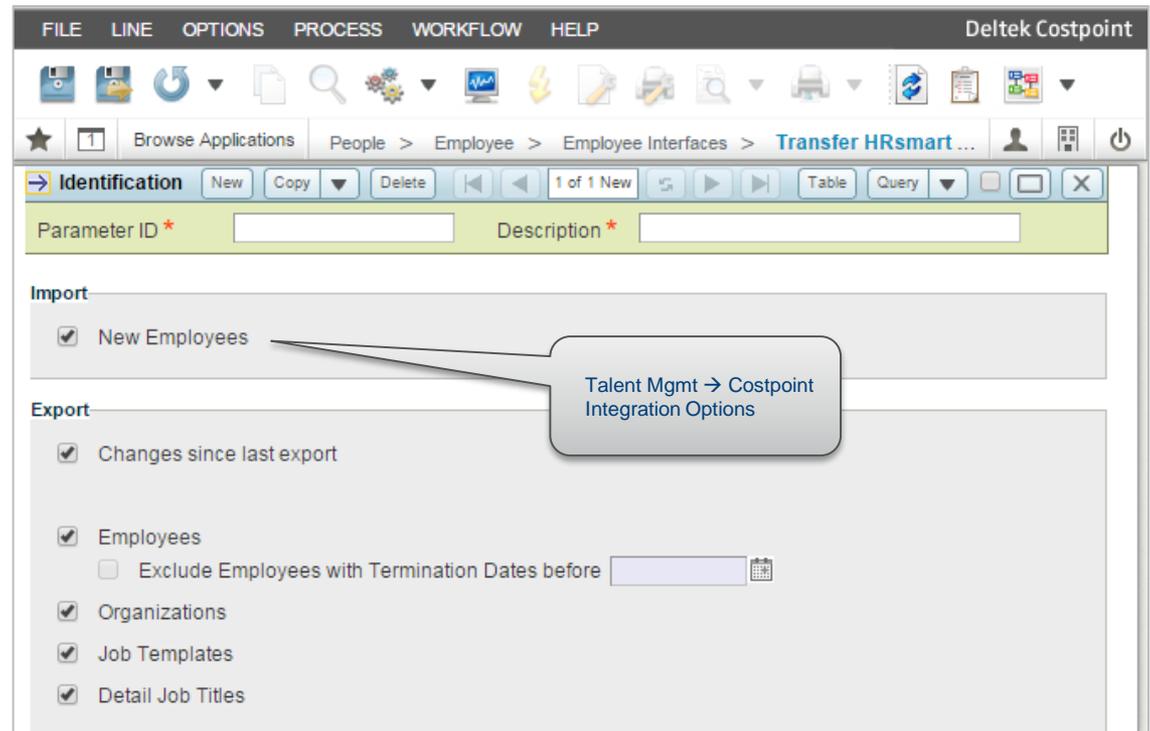
Overview

- Automatically Creates New Hires in Costpoint
- Integration Execution
 - Execute on Demand
 - Scheduled
- Integration Method
 - New Costpoint App that Utilizes HRsmart API
- Future
 - Re-Hires
 - Transfers (Internal Candidates)
 - Merit Increase/Bonus
 - Promotions
 - Off Boarding



Talent Management Integration Application

- Transfer Talent Management Data (EMPHRSDAT) (New Application)
- Execute on Demand or Scheduled



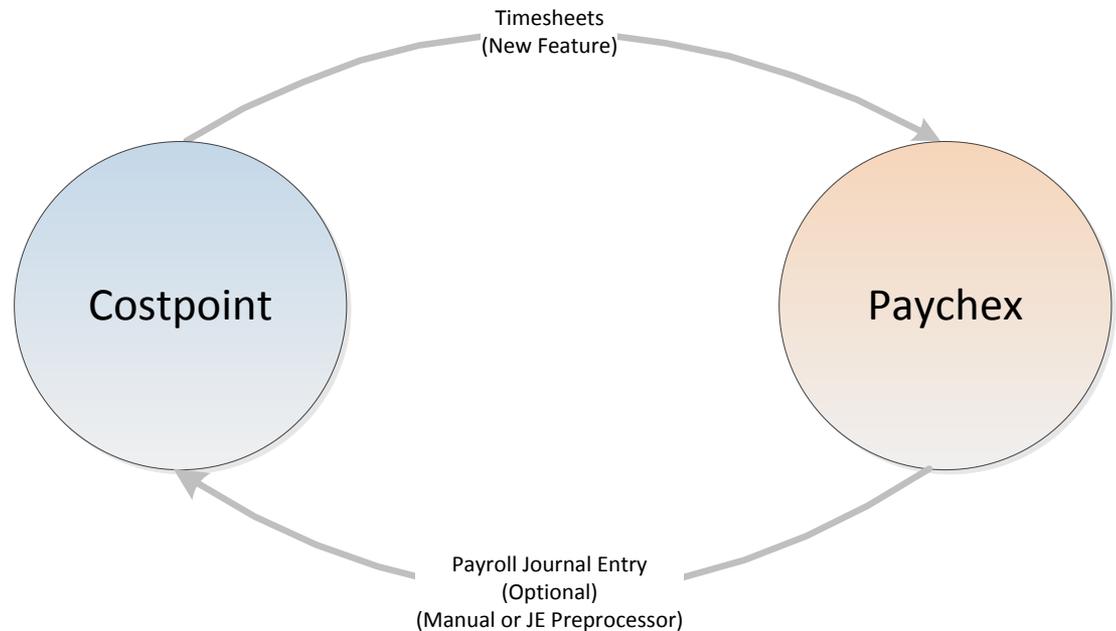
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Paychex Integration

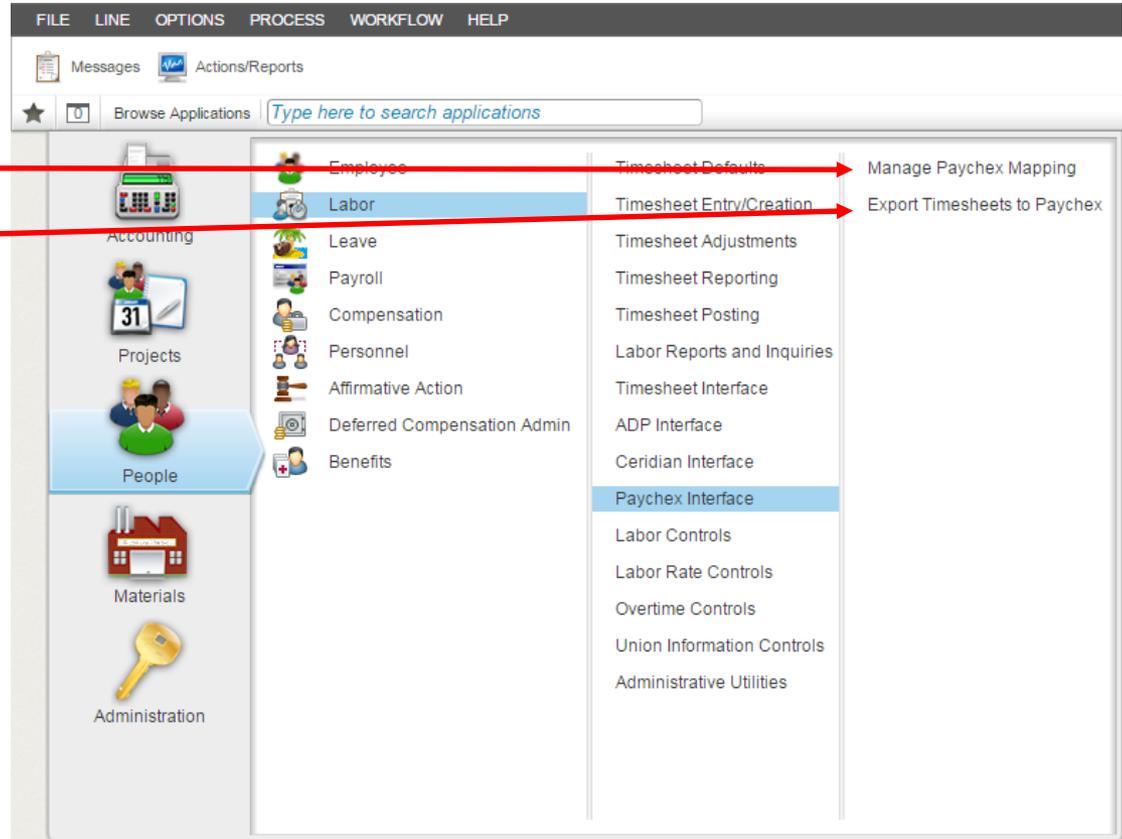
Overview

- Scope
 - Feature provides ability to export labor activity (timesheet data) from Costpoint to Paychex for payroll processing
- Note
 - Very similar functionality as ADP timesheet interface
 - Paychex can assist clients with creation of journal entry that matches Costpoint JE preprocessor layout
 - Feature is not licensed



Feature Walkthrough

- Feature consists of two applications:
 - Configuration
 - Export



Feature Walkthrough - Configuration

Client ID *	Map Type *	Account/Pay Type *	Account/Pay Type Description	Bonus Pay Type	Paychex Pay Pay Component *
PCXW0001	Account	05000-001	Govt. - Part-Time Labor	<input type="checkbox"/>	Part-Time Laborrrrx
PCXW0001	Account	05000-011	Govt. - Unallowable Labor	<input type="checkbox"/>	Unallowable LaborXXX
PCXW0001	Account	05300-020	Internal QC-Direct Labor	<input type="checkbox"/>	QC Only Direct Labor
PCXW0001	Pay Type	11B	11 - Regular	<input type="checkbox"/>	11 B Regular Payroll
PCXW0001	Pay Type	11C	11 - Regular	<input type="checkbox"/>	11 C Direct LaborXXX
PCXW0001	Pay Type	12A	12ARegular	<input type="checkbox"/>	12 A Regular Payroll
PCXW0001	Pay Type	13M	13th Month Pay	<input checked="" type="checkbox"/>	13th Month Pay Good
PCXW0001	Pay Type	14M	14th Month Pay	<input checked="" type="checkbox"/>	14th Month Pay Thanx

- Provides ability to map Costpoint pay types or accounts to Paychex pay component (Earnings codes)
- Ability to support clients with multiple Paychex Client IDs

Feature Walkthrough - Export

- Provides ability to generate ASCII files based on official Paychex layout
- Ability to filter by
 - Paychex Client ID
 - Timesheet Cycle
 - Timesheet Dates
 - Regular vs Bonus

The screenshot shows the 'Export Timesheets to Paychex' window in the Deltek Costpoint application. The window title is 'Deltek Costpoint' and the menu bar includes FILE, LINE, OPTIONS, PROCESS, WORKFLOW, and HELP. The toolbar contains icons for Save, Save & Continue, Refresh, Clone, Execute, Default Action, Actions/Reports, Page Setup, and Print Options. The breadcrumb trail is 'People > Labor > Paychex Interface > Export Timesheets to Paychex'. The main content area is titled 'Identification' and contains the following sections:

- Parameter ID *** and **Description *** text input fields.
- Selection Ranges** section with a table:

	Options	Start	End
Timesheet Cycle *	One	<input type="text"/>	
Timesheet Dates *	Range	<input type="text"/>	<input type="text"/>
- Options** section with:
 - Client ID *** text input field.
 - Four checkboxes: 'Set Payroll Computed/Posted Flag', 'Include Correcting Timesheets', 'Create Separate Check for Bonus Timesheets', and 'Send Timesheet WH State as Override State'.
- Generate** section with:
 - File Name *** text input field.
 - File Location** text input field.

Implementation Considerations

- With the mapping being based on account or pay type to Paychex pay component it will need to be determined how you will accomplish the mapping.
- The mapping allows for both account and pay type mapping. For example you may want to map leave charges based on account and other charges based on pay type.
- Like ADP interface, the Paychex interface will pick up the employee ID from one of two sources. If a Payroll Service ID is tied to the employee, interface will use it. If there is not one, it will use the CP employee ID. See integration mapping for further information

Integration Mapping

Paychex Field	Column	Description	Costpoint Source
Client ID*	1	Alphanumeric Must match the Client ID of the client that the user is logged into while performing the import.	Specified Client ID in the screen
Worker ID*	2	Alphanumeric - used as identifiable info for pay entry	[LDMEINFO]Payroll Service ID (if not blank) Otherwise, the first 10 characters of employee ID ([LDMEINFO]Employee)
Org	3	Based on 10 level maximum, 6 characters maximum per level Pipe delimited Ex. 246856 2543 26487 2485 (can have up to 60 digits only based on number of org units)	Empty
Job Number	4	Valid Values: all active job numbers set up on the client	Empty
Pay Component*	5	Must be the custom name of an active pay component as it is set up on the client - case sensitive.	Determine the [AOMPYCHX] Pay Component based from the [AOMPYCHX] Account / Pay Type Mapping of the Client ID . Account take precedence over pay type, meaning the pay component of the account will be used if there is a match for both account and pay type.
Rate	6	Range = 0.0001 <= 9999.9999 Overrides any loaded rate or rate # for the earning, if one exists. An earning can include only one of the following: Rate, Rate#, or Amount.	Empty

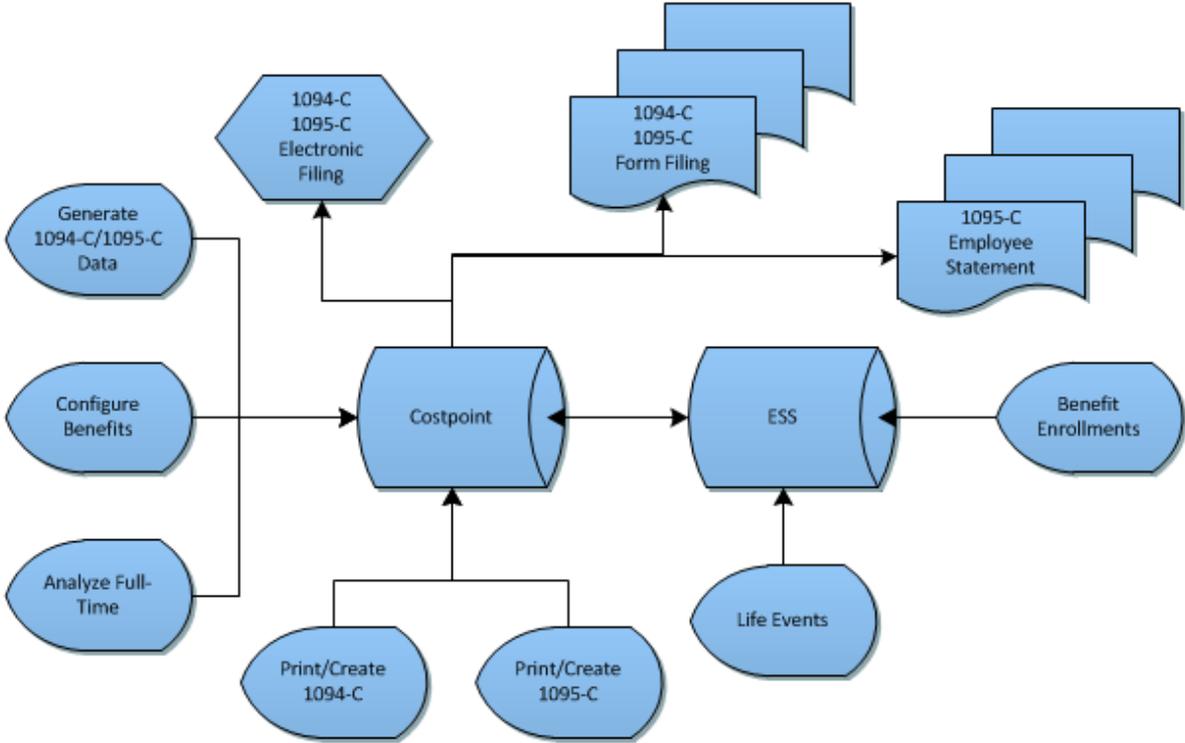
Integration Mapping (Continued)

Paychex Field	Column	Description	Costpoint Source
Rate #	7	Denotes which loaded pay rate # to use for the earning. Valid Values - 1, 2, 3, 4, 5, 6 Overrides any default rate # or rate for the earning, if one exists. 6 = 0.00 Track Memo Hours	Empty
Hours	8	Range = -999.99 through 999.99 An Earning can include either Hours or Units, not both.	[LDMTIME]Hours NULL: If hours is 0.00 and [LDMTIME]Pay Type is Cost Only [LDMPAYTP]Pay Type = Cost-only
Units	9	Range = -999,999 through 999,999	Empty
Line Date	10	mm/dd/yyyy Only valid for earnings type pay components.	Empty
Amount	11	Range = -9999999999.99 through 9999999999.99	[LDMTIME]Labor Cost Where Hours NULL Otherwise NULL Send amount only if timesheet line pay type is Cost-only.

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Affordable Care Act Support

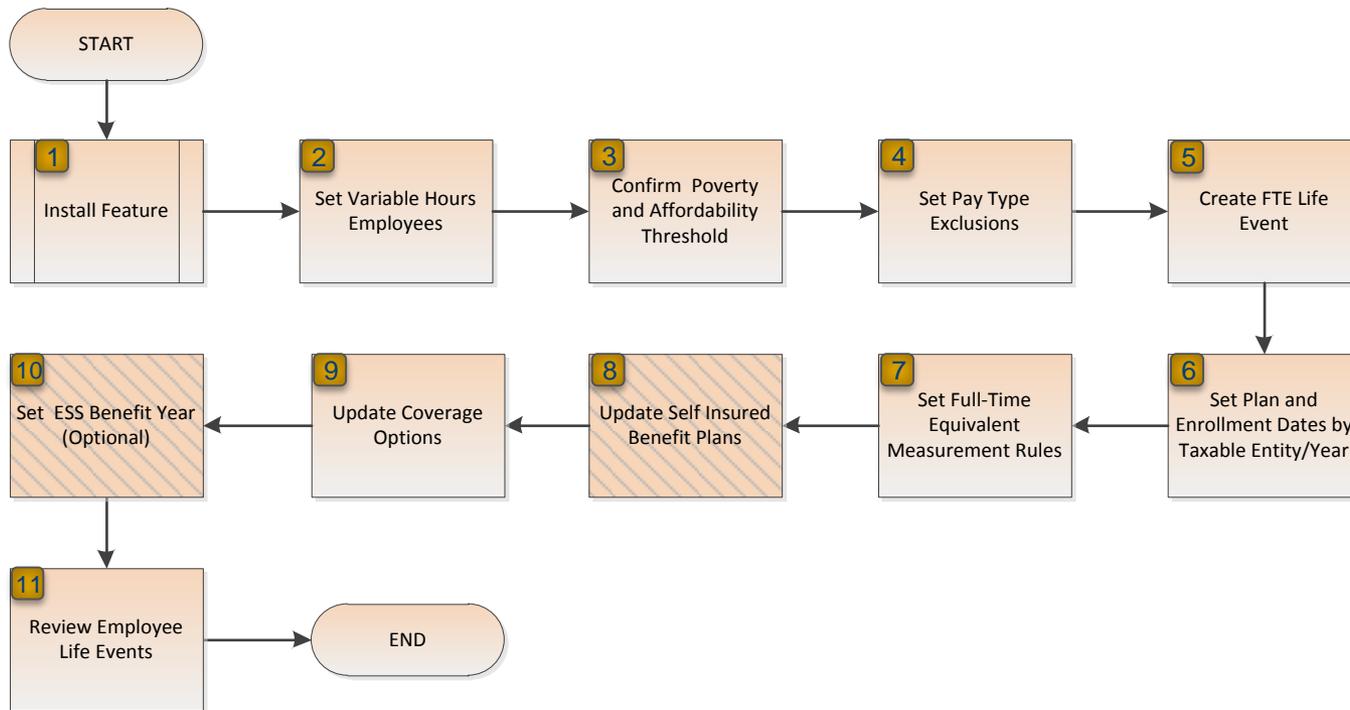
Feature Overview



Affordable Care Act

Implementation

ACA Implementation



1 – Install Feature

- Released in 4 Phases
 - Configuration Applications (Phase I) (Aug)
 - Costpoint 7.0.1 - System Jar 040
 - Costpoint 7.1.1 - System Jar 009
 - Processing Applications (Phase II) (Sept)
 - Costpoint 7.0.1 – Patch 7072
 - Costpoint 7.1.1 – Patch 7073
 - Reporting Applications (Phase III) (Mid - Nov)
 - Costpoint 7.0.1 – Patch 2800
 - Costpoint 7.1.1 – Patch 2801
 - ESS Bundle – Mid Dec
 - Costpoint 7.0.1 – Patch 2814
 - Costpoint 7.1.1 – Patch 2815
 - Test pattern 1094/1095 – Mid Dec
 - Hot Fixes – Mid Dec
 - **Electronic Filing (Jan 2016)**
 - **Costpoint 7.0.1 – TBD**
 - **Costpoint 7.1.1 – TBD**

2 – Set Variable Hours Employees (Updated App)

- Variable Hours Employee can be set via any of the following:
 - Manage Employee Salary Information (LDMEHIS)
 - Import Employee Data (AOPUTLEL)
 - Can be used as filter for full time analysis (Optional)

A new employee is a variable hour employee if, based on the facts and circumstances at the start date, it cannot be determined that the employee is reasonably expected to work on average at least 30 hours per week over the initial measurement period.

The screenshot shows the 'Manage Employee Salary Information' application. The 'Employee Type' dropdown menu is open, and the 'Variable Hours Employee' option is selected and highlighted with a red box. Other visible fields include Effective Date, End Date, Estimated Annual Hours, Standard Hourly Rate, Employee Class, Employee Type, Rate Type, FLSA Classification, Home ORGANIZATION, HR ORGANIZATION, Detail Job Title, Security ORGANIZATION, Manager, Personnel Action 1, Personnel Action 2, Personnel Action 3, REF ONE, REF TWO, Rate Group, Currency, Labor Group, Labor Location, Work Schedule, GLC, PLC, Overtime State, and Time Collection.

Update* - Verify mailing address has correct country

3 – Confirm Poverty and Affordability Threshold (Updated App)

- Configured in Manage Federal Taxes (PRMFTI)
- Configured by Payroll Year
- 2015 values already initialized. Will be part of tax table updates going forward for later years
- Used in determining health care affordability

The screenshot shows the 'Manage Federal Taxes' application interface. The 'Payroll Year' is set to 2015. The configuration is organized into several sections:

- Social Security:** Wage Limit (118,500.00), Employer Rate (6.20%), Employee Rate (6.20%)
- Medicare:** Wage Limit (9,999,999.00), Employer Rate (1.45%), Employee Rate (1.45%), Additional Tax Threshold (200,000.00), Additional Tax Rate (0.90%)
- FUTA:** Wage Limit (7,000.00), Employer Rate (0.60%), Credit Rate (5.40%)
- Adjusting Amounts:** Exemption Amount (4,000.00), Nonresident Alien Additional Amount (2,300.00)
- Supplemental Wages:** Supplemental Tax Rate (\$1,000,000 and Under) (25.00%), Supplemental Tax Rate (Over \$1,000,000) (39.60%)
- 401(K):** Wage Limit (265,000.00), Deferral Limit (18,000.00)
- Affordable Care Act (highlighted in red):** Federal Poverty Level (11,770.00), Safe Harbor Affordability Rate (0.095)

[FUTA Credit Reduction States](#)

4 – Set Pay Type Exclusions (Updated App)

- Configured in Manage Pay Types (LDMPAYTP)
- Added checkbox to exclude hours for specific pay types
- Used in logic to determine full time hours worked
- Only required if there was certain hours not included in full time analysis

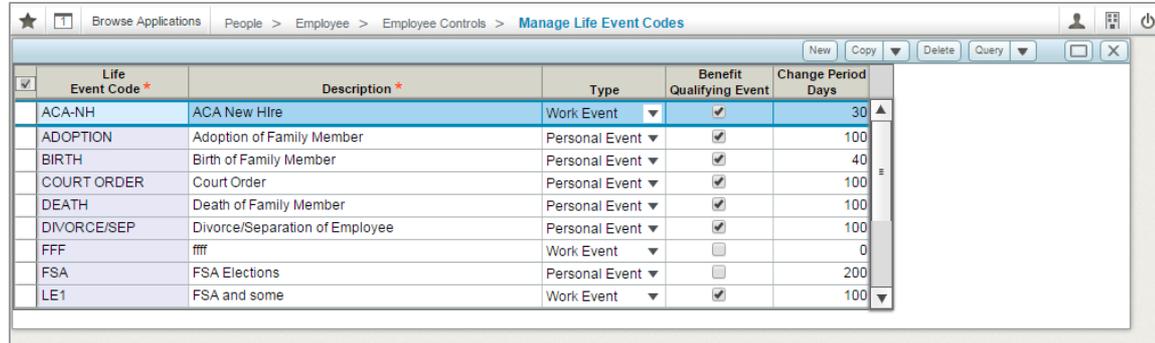
The screenshot displays the 'Manage Pay Types' application window. The title bar shows the navigation path: 'Browse Applications | People > Labor > Labor Rate Controls > Manage Pay Types'. The main window is titled 'Identification' and contains several sections:

- Identification:** Fields for 'Pay Type Code *', 'Description *', and 'Factor *'.
- Details:**
 - Additional Calculations Based on an Amount:** Radio buttons for 'Add pay type amount to timesheet line', 'Multiply hours times pay type amount' (selected), and 'Multiply hours times pay type amount times factor'. An 'Amount *' field is set to '0.0000'.
 - Employee Eligibility:** Checkboxes for 'Exempt', 'Non-Exempt', and 'Salaried'.
 - Overtime Premium Recasting:** Checkboxes for 'Eligible for overtime premium recasting' and 'Recast Pay Type'.
 - Allocate Compensated Overtime:** Checkboxes for 'Calculate overtime premium on this Pay Type' and 'Allocate overtime premium to this Pay Type'.
 - Weighted Averages:** Radio buttons for 'Include this Pay Type in determining the weighted average' (selected), 'Recalculate this Pay Type', and 'Not applicable (do not include or recalculate)'.
- Pay Type Categories:** A list of checkboxes including 'Overtime', 'Cost-only', 'Benefit reimbursement', 'Reimbursement - Exclude from gross earnings', 'Leave without pay (LWOP)', 'Leave Without Pay (LWOP)-Negative', 'Severance', 'Federal-non-taxable sick pay wages', and 'Exclude from ACA Full-Time Equivalent Analysis' (highlighted with a red box).

Transaction Currency Overrides

5 – Create FTE Life Event (Existing App)

- Create new life event that will be used to indicate eligibility of full time benefits for a part time, seasonal, or variable hours employee who is determined to be a FTE (full-time equivalent)
- Benefit Qualifying Event check box must be selected
- Change Period Days should match the enrollment period (the period in which the employee can elect or



The screenshot shows a web application window titled "Manage Life Event Codes". The window contains a table with the following columns: Life Event Code, Description, Type, Benefit Qualifying Event, and Change Period Days. The table lists several life event codes, including ACA-NH, ADOPTION, BIRTH, COURT ORDER, DEATH, DIVORCE/SEP, FFF, FSA, and LE1. The "Benefit Qualifying Event" column has checkboxes, and the "Change Period Days" column has numerical values.

Life Event Code *	Description *	Type	Benefit Qualifying Event	Change Period Days
ACA-NH	ACA New Hire	Work Event	<input checked="" type="checkbox"/>	30
ADOPTION	Adoption of Family Member	Personal Event	<input checked="" type="checkbox"/>	100
BIRTH	Birth of Family Member	Personal Event	<input checked="" type="checkbox"/>	40
COURT ORDER	Court Order	Personal Event	<input checked="" type="checkbox"/>	100
DEATH	Death of Family Member	Personal Event	<input checked="" type="checkbox"/>	100
DIVORCE/SEP	Divorce/Separation of Employee	Personal Event	<input checked="" type="checkbox"/>	100
FFF	fff	Work Event	<input type="checkbox"/>	0
FSA	FSA Elections	Personal Event	<input type="checkbox"/>	200
LE1	FSA and some	Work Event	<input checked="" type="checkbox"/>	100

6 – Set Plan and Enrollment Dates by Taxable Entity/Year (New App)

- New application to set Start/End dates for Open Enrollment and Coverage - Manage Benefit Years by Taxable Entity (HBMBENYR)
- Provides option to indicate transition relief
- Need to setup 2014 (Ongoing Employees), 2015 and 2016
- Note: Subtask for Full-Time Equivalent Measurement Rules

The screenshot shows a web application window titled "Manage Benefit Years by Taxable Entity". The interface is divided into two main sections: "Identification" and "Details".

Identification Section:

- Benefit Year ***: 2016
- Taxable Entity ***: W2KATH | Payroll QC Group's Company | DON'T USE

Details Section:

- Open Enrollment Start Date ***: 11/01/2015
- Open Enrollment End Date ***: 11/30/2015
- Plan Year Start Date ***: 01/01/2016
- Plan Year End Date ***: 12/31/2016

At the bottom of the details section, there is a checkbox labeled "Certified for Transition Relief" which is currently unchecked. A red box highlights a link labeled "Full-Time Equivalent Measurement Rules" in the bottom right corner of the application window.

7 – Set Full-Time Equivalent Measurement Rules (New App)

- Subtask to Manage Benefit Years by Taxable Entity (HBMBENYR)
- Provides Measurement Rules for Ongoing and Initial employees based on Benefit Year and Taxable Entity with options to further apply rules by Rate Type, State and Labor Group
- Defines the following Periods:
 - Coverage Period
 - Enrollment Period
 - Administrative Period
 - Measurement Period

✓ Dates Used for Determination of Full-Time Equivalent Emplo... New Copy Delete 1 of 1 Existing Table Query

Rate Type Range Type * All Rate Type
State Range Type * All State
Labor Group Range Type * All Labor Group

Ongoing Employees

Coverage Period Start Date * 01/01/2015
Coverage Period End Date * 12/31/2015
Enrollment Period Start Date * 12/01/2014
Enrollment Period End Date * 12/31/2014
Enrollment Method * Open Enrollment
Life Event
Administrative Period Start Date * 11/01/2014
Administrative Period End Date * 11/30/2014
Measurement Period Start Date * 08/01/2014
Measurement Period End Date * 10/31/2014

New Employees

Initial Measurement Period

Measurement Period Start Method Hire Date
 First Day of Month Following Hire Date
Measurement Period (Months) * 3

Initial Administrative Period

Administrative Period (Days) * 30

Initial Open Enrollment and Coverage Period

Life Event * ACA-NH
Enrollment Period (Days) 30
Coverage Period Start Method Day After Enrollment Period
 First Day of Month Following Enrollment Period
Coverage Period (Months) * 12

Ok

8 – Update Self Insured Benefit Plans – Change (Updated App)

- Manage Benefit Plans (HBMBPSET) screen: Provided the ability to indicate whether a plan is an Employer-Sponsored Self-Insured plan.
- Note: Subtask for Coverage Options (Next Slide)

The screenshot shows the 'Manage Benefit Plans' application window. The title bar indicates the path: 'Browse Applications > People > Benefits > Benefit Entry and Creation > Manage Benefit Plans'. The main content area is divided into three tabs: 'Benefit Plan Details', 'Eligibility Rules', and 'Enrollment/Coverage Rules'. The 'Benefit Plan Details' tab is active, showing a form with the following fields and options:

- Benefit Plan Code ***: Text input field.
- Description ***: Text input field.
- Provider ***: Text input field.
- System Benefit Type ***: Dropdown menu with '-Select-' selected.
- User Benefit Type**: Text input field.
- Plan Information URI**: Text input field.
- Plan Status**: Radio buttons for 'Active' (selected) and 'Inactive'.
- ESS Visibility**: Checkboxes for 'Exclude from Current Elections' and 'Exclude from Benefit Options'.
- Employer-Sponsored Self-Insured Health Plan**: A checkbox that is currently unchecked and highlighted with a red box.

At the bottom of the form, there are four tabs: 'Coverage Detail', 'Coverage Options' (highlighted with a red box), 'Valid Postal Codes', and 'Valid States'.

9 – Update Coverage Options (Updated App)

- Provided ability to specify whether a Benefit Plan/Coverage Option provides minimum essential coverage (as reported in the 1095-C)
- Provided ability to specify whether a Benefit Plan/Coverage Option provides minimum value (as reported in the 1095-C)
- Verify the “Dependents Eligibility and Required” check box and the “Dependent Type” option
- Provided the ability to set an override employee premium amount. Can be used when Health and Welfare fringes apply.

The screenshot displays the 'Coverage Options' application window. The main window has a title bar with 'Coverage Options' and standard window controls. Below the title bar, there are several dropdown menus and buttons: 'Coverage Calculation Method * Amount', 'Coverage Table * None', 'Cash Out Option', 'Premium Calculation Method * Amount', 'Premium Table * None', and 'Pay Type'. A 'Coverage Options Details' button is visible in the top right corner.

The 'Coverage Option Details' window is open, showing a form with the following fields and sections:

- Start Date ***: [Text Field]
- End Date ***: [Text Field]
- Coverage Option ***: [Text Field]
- Deduction**: [Text Field]
- Provides Minimum Essential Coverage**:
- Provides Minimum Value**:
- Dependents Eligible and Required**:
- Dependent Type ***: [Dropdown Menu, currently set to 'None']
- Amounts/Tables**:
 - Coverage Factor/Amount: [Text Field]
 - Employee Amount: [Text Field]
 - Employee Percent: [Text Field]
 - Coverage Table: [Text Field]
 - Company Amount: [Text Field]
 - Company Percent: [Text Field]
 - Rate Table: [Text Field]
 - Premium: [Text Field]
 - Cash Out Amount: [Text Field]
- 1095-C Reporting**:
 - Apply Override**:
 - Override Employee Amount: [Text Field]

10 – Set ESS Benefit Year (Updated App)

- Only required if using Employee Self-Service (ESS)
- Set in Manage ESS Company Settings (AOMESSCS)

The screenshot displays the 'Manage ESS Company Settings' application window. The 'Benefits Settings' section is visible, with the 'Benefit Year' field highlighted by a red rectangle. The 'Benefit Year' field is currently empty. Below it, there are fields for 'Open Enrollment Plan Year', 'Open Enrollment Period', 'Current Plan Year', and 'FSA Year'. The 'Open Enrollment Period' section includes 'Start Date (MM/DD)' and 'End Date (MM/DD)'. The 'Current Plan Year' section includes 'Plan Year End Date'. The 'FSA Year' section includes 'Current FSA Year' and 'New FSA Year'. There is also a checkbox for 'Check date for final pay period of current FSA year falls within current FSA Year'. The 'Address/Telephone Module Settings' section includes a checkbox for 'Prompt Vendor Address Update' and a text field for 'Life Event for Postal Code/State Change'. The 'Other Module Settings' section includes a text field for 'Months of Expense History'. At the bottom right, there are links for 'Severance Pay Types' and 'Deferred Compensation Settings'.

11 - Manage Employee Life Events (HBMEQEV) (Updated App)

- Review existing Employee Life Event records where the Life Event qualified the employee for new benefits or a change to their benefit coverage in the 2015 calendar year. Provide the Benefit Year and Coverage Dates for those records.

Note: This is a ONE time step

- A Benefit Year will be required for Life Events which are flagged as Benefit Qualifying Events
- An Override Coverage Start Date and End Date can be specified
- When an employee's hours-worked result in full-time benefits eligibility and an Employee Life Event record is generated from Costpoint's Analyze Full-Time Equivalent Eligibility application, the Full-Time Equivalent Employee checkbox will be set to 'Y' and the Benefit Year & override coverage dates will be automatically populated.

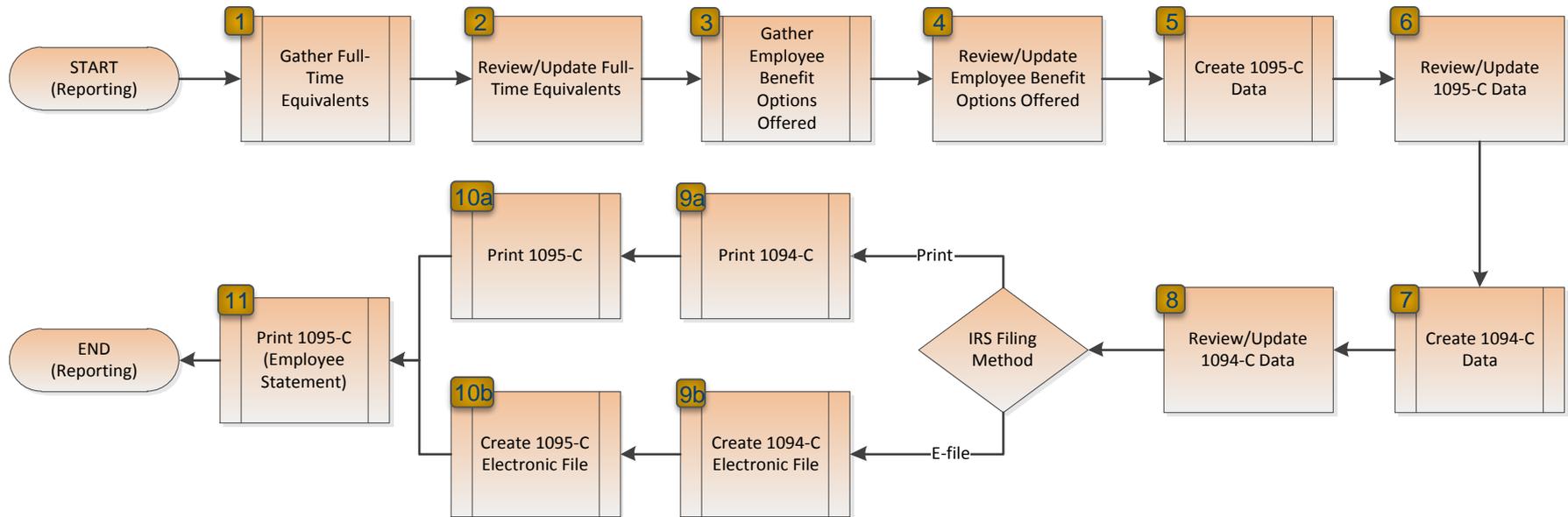
The screenshot shows a web application interface for managing employee life events. The main form is titled 'Identification' and includes fields for Employee, Life Event, Date, Type, and a checkbox for 'Benefit Qualifying Event'. Below this is a 'Details' section with several fields: 'Benefit Year', 'Change Period Days', 'Change Period End Date', 'Default Benefit Package', 'Override Coverage Start Date', 'Override Coverage End Date', and a checkbox for 'Full-Time Equivalent Employee'. Red boxes highlight the 'Benefit Year', 'Override Coverage Start Date', and 'Override Coverage End Date' fields.

Existing screen with new fields added. Screen should already be used if non-ESS user and if ESS user, the data will be populated by ESS life events

Affordable Care Act

Reporting

ACA Reporting



1 - Gather Full-Time Equivalent (New App)

- Screen – Analyze Full-Time Equivalent Eligibility (HBPFTTE)
- **New** process application to determine employees who qualify for full-time benefits based on their hours worked.
- First run for all preceding months in the calendar year for which you will generate 1095-Cs (INITIALIZATION)
 - Run for entire 2014 and 2015
- Run at least monthly going forward
- Option to filter employees
- Option to automatically approve benefit offer eligibility for full-time equivalent employees
- Allow or prevent overwrite of existing records
- Can be run on schedule going forward

The screenshot shows a web-based application window titled 'Analyze Full-Time Equivalent Eligibility'. The interface includes a navigation bar with 'Browse Applications', 'People >', 'Benefits >', and 'Affordable Care Act >'. Below the navigation bar is a toolbar with 'New', 'Copy', 'Delete', and navigation arrows. The main content area is divided into sections: 'Identification' with fields for 'Parameter ID' and 'Description'; 'Selection Ranges' with a table for 'Taxable Entity' and 'Employees' (both set to 'All'), 'Date Method' (radio buttons for 'Prior Calendar Month' and 'Specific Date Range'), and 'Dates' (set to 'Range' from 08/01/2015 to 08/31/2015); and 'Options' with checkboxes for 'Include Part-Time Employees', 'Include Variable Hours Employees', 'Include Seasonal Employees', 'Automatically approve eligible Employees for full-time status', and 'Overwrite Existing Full-Time Equivalent Eligibility and Employee Life Event Records'. At the bottom right, there are links for 'Taxable Entity Non-Contiguous Ranges' and 'Employee Non-Contiguous Ranges'.

2 - Review/Update Full-Time Equivalent (New App)

- Screen – Manage Full-Time Equivalent Eligibility (HBMFTE)
- Populated based on Analyze Full-Time Equivalent Eligibility processing
- Enter, review, or update Full-Time Equivalent Eligibility data

The screenshot shows the 'Manage Full-Time Equivalent Eligibility' application. The 'Identification' section is highlighted in green and contains the following fields: Employee, Taxable Entity, Measurement Period Start Date, and Measurement Period End Date. A red box highlights the 'Full-Time Equivalent' checkbox, which is currently unchecked, and the 'Coverage Offer Status' dropdown menu, which is set to 'Not Applicable'. The 'Analysis and Coverage Details' section contains fields for Analysis Type, Benefit Year, Measurement Period Total Hours, Average Hours Per Month, Administrative Period Start Date, Administrative Period End Date, Enrollment Period Start Date, Enrollment Period End Date, Coverage Offer Start Date, Coverage Offer End Date, Life Event, and Benefit Package. The 'Employee Details' section includes fields for Hire Date, Employee Type, Rate Type, Variable Hours Employee, Seasonal Employee, State/Province, and Labor Group. The 'Notes' section is a large text area at the bottom right.

3 - Gather Employee Benefit Options Offered (New App)

- New screen - Store Employee Benefit Options Offered (HBPOPTOF) - process application to gather benefit options offered.

Before implementation of ACA functionality, Costpoint did not store the benefit options *offered* to the employee (only the options elected). Because 1095-C reporting relies on knowing, not just the options elected, but also the options *offered*, this utility must be used to determine the options that were offered to the employee in the calendar year being reported.

2015 Reporting Initialization

Run this utility for any Benefit Year which includes 2015 in the plan year. For example, if your 2015 benefit year ran from 10/01/2014 to 09/30/2015 and your 2016 benefit year runs from 10/01/2015 to 09/30/2016, then you'd want to run this utility for both Benefit Year 2015 and Benefit Year 2016. (INITIALIZATION)

Getting Ready for 2016 Reporting

If you've already gone through your open enrollment for coverage in 2016 or had benefit-qualifying employee life events, you will also want to run this utility for your 2016 benefit year. For example, if your 2016 benefit year runs from 01/01/16 to 12/31/16 and your employees went through open enrollment in 2015, you'll want to run this utility for your 2016 benefit year to pick up the options offered (INITIALIZATION)

- Non-ESS users: Run at least monthly going forward
- ESS users: Going forward, the Activate Pending ESS Benefit Elections (AOPESSUE) application will automatically gather benefit options offered to employees via Life Events and Open Enrollment

Note: To be sure you are not missing any 2016 options that were offered prior to implementing the Costpoint ACA ESS bundle, it is recommended that you run this utility for any Benefit Year which includes day(s) within the 2015 and 2016 calendar years.

The screenshot shows a web-based application window titled 'Store Employee Benefit Options Offered'. The interface includes a navigation bar with 'Browse Applications', 'People > Benefits > Affordable Care Act > Store Employee Benefit Options Offered'. Below the navigation bar is an 'Identification' section with fields for 'Parameter ID' and 'Description'. A 'Selection Ranges' section contains a table with columns for 'Range Type', 'Start', and 'End'. The table has two rows: 'Benefit Year' with a dropdown set to 'One', and 'Employees' with a dropdown set to 'All'. To the right of the table are two checkboxes: 'Taxable Entity Non-Contiguous Range' and 'Employee Non-Contiguous Range'. An 'Options' section at the bottom has a checkbox for 'Overwrite Existing Benefit Options'. At the bottom right, there are two links: 'Taxable Entity Non-Contiguous Ranges' and 'Employee Non-Contiguous Ranges'.

3 - Gather Employee Benefit Options Offered (New App) (Continued)

- ESS users: The Update Benefit Option/Election Tables (AOPESSDB) application has been updated to offer full-time benefits to any approved full-time equivalent employees

The screenshot shows a web application interface for 'Update Benefit Option/Election Tables'. The breadcrumb navigation is 'Browse Applications > People > Employee > Employee Interfaces > Update Benefit Option/Election Tables'. The main section is titled 'Identification' and contains a table with columns 'Parameter ID' and 'Description'. Below this is a 'Selection Ranges' section with a table:

	Option	Start	End
Taxable Entity	All		
Employee	All		

Below the selection ranges is an 'Options' section with a group box 'FSA Elections/Options' containing two checked options: 'Medical Care' and 'Dependent Care'. There are also unchecked options for 'Current Elections' and 'Benefit Options'.

4 – Review/Update Employee Benefit Options Offered (New App)

- Screen - Manage Employee Benefit Options Offered (HBMOPTOF)
- Enter, review or update Employee Benefit Options Offered in a **new** application
- Generated from Store Employee Benefit Options Offered or Activate Pending ESS Benefit Elections (for ESS users)

The screenshot displays the 'Manage Employee Benefit Options Offered' application interface. It is divided into three main sections:

- Identification:** Contains fields for Employee (with a search icon), Taxable Entity, and Benefit Year. There are also checkboxes for 'Full-Time Equivalent' and 'Employee Enrolled in Coverage on an Exchange'.
- Benefit Offer Details:** Contains fields for Benefit Package, Benefit Plan, Coverage Option, Enrollment Method, Life Event, Employee Monthly Premium, Company Monthly Premium, Total Monthly Premium, Cash-Out Amount, Coverage Offer Start Date, and Coverage Offer End Date. It also includes checkboxes for 'Dependent(s) Eligible and Required', 'Provides Minimum Essential Coverage', and 'Provides Minimum Value'. A 'Dependent Type' field is also present.
- Dependents:** A table with columns for 'Dependent Name', 'Gender', 'Relationship', and 'Date of Birth'. There is a checkmark in the first row and an 'Ok' button at the bottom right.

5 – Create 1095-C Data (New App)

- Screen - Create 1094-C and 1095-C Data (HBP109XC)
- **New** process application that builds 1095-C data
- This app also used to generate 1094-C data but need to run 1095-C first

The screenshot shows a web-based application window titled "Create 1094-C and 1095-C Data". The interface is organized into several sections:

- Identification:** Includes fields for "Parameter ID" and "Description".
- Reporting Type:** Features two radio buttons: "1095-C Data" (selected) and "1094-C Data".
- Selection Ranges:** Contains fields for "Calendar Year", "Taxable Entity", and "Employees". It also includes checkboxes for "Authoritative Transmittal", "Member of an Aggregated ALE Group", and "Employee Non-Contiguous Range".
- Form 1094-C Options:** Includes "ALE Member Total Employee Count Method" with radio buttons for "First Day of Each Month" (selected), "Last Day of Each Month", "12th Day of Each Month", "First Day of First Payroll Period Starting in Each Month", and "Last Day of First Payroll Period Starting During Each Month". It also has checkboxes for "Qualifying Offer Method", "Qualifying Offer Method Transition Relief", "Section 4980H Transition Relief", and "98% Offer Method".
- Designated Government Entity (DGE):** Includes fields for "DGE Person to Contact" and "DGE Contact Telephone Number".
- Options:** Includes a checkbox for "Overwrite Existing Records" and fields for "Contact Employee" and "Contact Telephone Number".

At the bottom right, there are links for "Other Taxable Entities (Other ALE Members)" and "Employee Non-Contiguous Ranges".

6 - Update/Review 1095-C Data (New App)

- Screen - Manage 1095-C Data (HBM1095C)
- New application to review or edit 1095-C source data

The screenshot displays the 'Manage 1095-C Data' application interface. The window title is 'Manage 1095-C Data' and it shows a form for entering employee and employer information. The form is divided into three main sections: Part I (Employee and Applicable Large Employer Member), Part II (Employee Offer and Coverage), and Part III (Covered Individuals).

Part I - Employee

1 Name of Employee
2 Social Security Number (SSN)
3 Street Address (including apt number)
4 City or Town
5 State/Province
6 Country and ZIP or Foreign Postal Code

Applicable Large Employer Member (Employer)

7 Name of Employer
8 Employer Identification Number (EIN)
9 Street Address (including room or suite number)
10 Contact Telephone Number
11 City or Town
12 State/Province
13 Country and ZIP or Foreign Postal Code

Part II - Employee Offer and Coverage

14 Offer of Coverage
15 Empl Share of Lowest Cost Monthly Prem
16 Applicable Section 4980H Safe Harbor

Part III - Covered Individuals

Individual Type: Employee Dependent
Covered All 12 Months:
Dependent Name: _____
Social Security Number (SSN): _____
Date of Birth (if SSN not available): _____
Months of Coverage: January February March April May June July August September October November December

7 – Create 1094-C Data (New App)

- Create 1094-C and 1095-C Data (HBP109XC)
- **New** process application that builds 1094-C data

Browser Applications | People > Benefits > Affordable Care Act > Create 1094-C and 1095-C Data

Identification | New | Copy | Delete | 1 of 1 New | Table | Query

Parameter ID * | Description *

Reporting Type

1095-C Data
 1094-C Data

Selection Ranges

RangeType	Start	End
Calendar Year *	One	
Taxable Entity *	One	
Employees *	All	

Authoritative Transmittal
 Member of an Aggregated ALE Group
 Employee Non-Contiguous Range

Form 1094-C Options

ALE Member Total Employee Count Method (Fields 23b - 35b)

First Day of Each Month
 Last Day of Each Month
 12th Day of Each Month
 First Day of First Payroll Period Starting in Each Month
 Last Day of First Payroll Period Starting During Each Month (last day must fall within the same calendar month)

Certifications of Eligibility (Field 22)

Qualifying Offer Method
 Qualifying Offer Method Transition Relief
 Section 4980H Transition Relief
 98% Offer Method

Designated Government Entity (DGE)

DGE Person to Contact | |
DGE Contact Telephone Number | |

Options

Overwrite Existing Records

Contact Employee | |
Contact Telephone Number * | |

[Other Taxable Entities \(Other ALE Members\)](#) | [Employee Non-Contiguous Ranges](#)

8 - Update/Review 1094-C Data (New App)

- Manage 1094-C Data (HBM1094C)
- New application to review or edit 1094-C source data

Browse Applications | People > Benefits > Affordable Care Act > Manage 1094-C Data

Manage 1094-C Data

Taxable Entity (ALE Member) * [] Calendar Year * [] Corrected Sequence Number []

Part I

Applicable Large Employer Member (ALE Member)

1 Name of ALE Member (Taxable Entity Name) [] 5 State/Province []

2 Employer Identification Number (EIN) [] 6 Country and ZIP or Foreign Postal Code []

3 Street Address (including room or suite number) [] 7 Person to Contact []

4 City or Town [] 8 Contact Telephone Number []

Designated Government Entity

Designated Government Entity (DGE) (if applicable) []

9 Designated Government Entity Name [] 13 DGE State/Province []

10 DGE Employer Identification Number (EIN) [] 14 DGE Country and ZIP or Foreign Postal Code []

11 DGE Street Address (including room/suite number) [] 15 DGE Person to Contact []

12 DGE City or Town [] 16 DGE Contact Telephone Number []

Applicable Large Employer Member (ALE Member)

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

Part II - ALE Member Information

19 Authoritative Transmittal for this ALE Member 22 Certifications of Eligibility Qualifying Offer Method

20 Total number of Forms 1095-C filed by and/or on behalf of ALE Member [] Qualifying Offer Method Transition Relief

21 ALE Member is a member of an Aggregated ALE Group (If "No," do not complete Part IV) Section 4980H Transition Relief

98% Offer Method

8 - Update/Review 1094-C Data (New App) (Continued)

- Manage 1094-C Data (HBM1094C)
- New application to review or edit 1094-C source data

Part III - ALE Member Information Monthly					
	a) Minimum Essential Coverage Offer Indicator	b) Full-Time Employee Count for ALE Member	c) Total Employee Count for ALE Member	d) Aggregated Group Indicator	e) Section 4980H Transition Relief
23 All 12 Months	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
24 Jan	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
25 Feb	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
26 Mar	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
27 Apr	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
28 May	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
29 Jun	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
30 Jul	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
31 Aug	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
32 Sep	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
33 Oct	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
34 Nov	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
35 Dec	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Part IV - Other ALE Members of Aggregated ALE Group

9a - Print 1094-Cs (IRS Copy) (New App)

- Print 1094-Cs (HBR1094C)

The screenshot displays the 'Print 1094-Cs' application window. The breadcrumb navigation at the top reads: 'Browse Applications > People > Benefits > Affordable Care Act > Print 1094-Cs'. The window title is 'Print 1094-Cs'. Below the navigation, there is a toolbar with buttons for 'New', 'Copy', 'Delete', and navigation arrows. The main content area is divided into three sections:

- Identification:** Contains two text input fields labeled 'Parameter ID *' and 'Description *'.
- Selection Ranges:** Contains a table with columns 'Range Type', 'Start', and 'End'.

Range Type	Start	End
Calendar Year *	One	
Taxable Entity *	All	

There is also a checkbox labeled 'Taxable Entity Non-Contiguous Range'.
- Options:** Contains radio buttons for '1094-C Type' (Regular and Correcting) and checkboxes for 'Print Test Pattern' and 'Truncate Payee Identification Numbers (Employer)'. A link for 'Taxable Entity Non-Contiguous Ranges' is located at the bottom right of this section.

10a - Print 1095-Cs (IRS Copy) (New App)

- Print 1095-Cs (HBR1095C)
- Acceptable if under 250 FTE employees
- Note changes coming for selecting IRS or Employee Statements and option for test pattern.

The screenshot shows a web application window titled "Print 1095-Cs". The breadcrumb navigation is "Browse Applications > People > Benefits > Affordable Care Act > Print 1095-Cs". The interface is divided into three main sections:

- Identification:** Contains two input fields: "Parameter ID *" and "Description *".
- Selection Ranges:** A table with columns "Range Type", "Start", and "End".

Range Type	Start	End
Calendar Year *	One	
Taxable Entities *	All	
Employees *	All	

There are also two checkboxes: "Taxable Entity Non-Contiguous Range" and "Employee Non-Contiguous Range".
- Options:** Contains several radio button and checkbox options:
 - 1095-C Type: Regular (selected), Correcting, Void
 - Page: Page 1 (selected), Page 2 (More than 6 dependents)
 - Orientation: Portrait (Employee/Employer Copy) (selected), Landscape (IRS Copy)
 - Print Test Pattern (checkbox)
 - Truncate Payee Identification Numbers (Employer and Employees) (checkbox)

At the bottom right, there are two links: "Taxable Entity Non-Contiguous Ranges" and "Employee Non-Contiguous Ranges".

9b - Create 1094-C Electronic File

■ Create 1094-C and 1095-C Electronic File (HBP1094C)

- Required if over 250 FTE

The screenshot shows a software window titled "Identification" with a toolbar containing "New", "Copy", "Delete", and navigation buttons. The form is divided into several sections:

- Parameter ID *** and **Description *** text input fields.
- Selection Ranges** section with a "Range Type" dropdown set to "One" and "Start" and "End" text input fields.
- Data File** section with "File Type *" dropdown set to "Production", "Filing Year Status *" dropdown set to "Current Filing Year", and a checkbox for "Replacement Record".
- Transmitter Contact Information** section with text input fields for "First Name *", "Middle Name", "Last Name *", and "Suffix", and a "Telephone Number *" field with a "Foreign Entity" checkbox.
- File Options** section with text input fields for "File Location *" and "Transmitter Control Code(TCC) *".

10b - Create 1095-C Electronic File (New App)

- Create 1094-C and 1095-C Electronic File (HBP1094C)
- Required if over 250 FTE

The screenshot shows a software window titled "Identification" with a toolbar containing "New", "Copy", "Delete", and navigation icons. The window is divided into several sections:

- Parameter ID *:** A text input field.
- Description *:** A text input field.
- Selection Ranges:**
 - Range Type:** A dropdown menu set to "One".
 - Taxable Entities *:** A dropdown menu set to "One".
 - Calendar Year *:** A dropdown menu set to "One".
 - Start:** A text input field.
 - End:** A text input field.
- Data File:**
 - File Type *:** A dropdown menu set to "Production".
 - Filing Year Status *:** A dropdown menu set to "Current Filing Year".
 - Replacement Record
 - Original Receipt ID:** A text input field.
- Transmitter Contact Information:**
 - Firat Name *:** A text input field.
 - Middle Name:** A text input field.
 - Last Name *:** A text input field.
 - Suffix:** A text input field.
 - Telephone Number *:** A text input field.
 - Foreign Entity
- File Options:**
 - File Location *:** A text input field.
 - Transmitter Control Code(TCC) *:** A text input field.

11 – Print Employee 1095-C (New App)

- Print 1095-Cs (HBR1095C)
- Must be provided to all FTE employees
- Note changes coming for selecting IRS or Employee Statements and option for test pattern.

The screenshot displays the 'Print 1095-Cs' application window. The title bar shows the breadcrumb path: 'Browse Applications > People > Benefits > Affordable Care Act > Print 1095-Cs'. The main content area is titled 'Identification' and includes a 'New' button, a 'Copy' dropdown, a 'Delete' button, and navigation controls. Below this is a form with two input fields: 'Parameter ID *' and 'Description *'. The 'Selection Ranges' section contains a table with columns for 'Range Type', 'Start', and 'End'. The 'Calendar Year *' is set to 'One', 'Taxable Entities *' is 'All', and 'Employees *' is 'All'. There are checkboxes for 'Taxable Entity Non-Contiguous Range' and 'Employee Non-Contiguous Range'. The 'Options' section includes radio buttons for '1095-C Type' (Regular, Correcting, Void), 'Page' (Page 1, Page 2), and 'Orientation' (Portrait, Landscape). There are also checkboxes for 'Print Test Pattern' and 'Truncate Payee Identification Numbers (Employer and Employees)'. At the bottom right, there are links for 'Taxable Entity Non-Contiguous Ranges' and 'Employee Non-Contiguous Ranges'.