Deltek Costpoint HotFix Readme

Released: November 15, 2016

Enhancements

Affordable Care Act – IRS-Mandated Updates to Forms 1094-C and 1095-C

As part of Affordable Care Act (ACA), the Internal Revenue System (IRS) has issued ACA reporting requirements for employers. Section 6056 of the Internal Revenue Code 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.

Multiple Costpoint applications were added and existing applications were enhanced to allow employers to meet the reporting requirements of the IRS. These Costpoint updates are released in multiple phases. This particular release includes the following updates:

- **Activate Pending ESS Benefit Elections (AOPESSUE)**

  - The application now tracks the **Spousal Conditional Offer** value for the Benefit Option offered. This is needed to report codes **1J** and **1K** on Line 14 of Form 1095-C.

  - The application populates the new **Spousal Conditional Offer** column (HB_EMPL_BEN_OFFER_LN.spouse_cond_offer_cd) based on the value of the same column for the Benefit Plan/Coverage Option/Coverage Offer Start Date combination.

  - The application now stores the 1095-C Reporting - **Override Employee Amount** value in the **Employee Monthly Premium** column (HB_EMPL_BEN_OFFER_LN.empl_prem_amt) if the **Apply Override** check box is selected. This information was required for 2015 1095-C reporting. The **Override Employee Amount** value was previously gathered when generating the 1095-C. To support this update, the application performs the following:

    - Store the 1095-C Reporting - **Override Employee Amount** in the HB_EMPL_BEN_OFFER_LN .empl_prem_amt column if the HB_EMPL_BEN_OFFER_LN.ovrd_1095_fl column value is **Y**.

    - Populate the new HB_EMPL_BEN_OFFER_LN.ovrd_1095_fl column. This will be used to indicate whether or not the **Employee Monthly Premium** value was gathered from the benefit option's **Override Employee Amount**.

- **Create 1094-C and 1095-C Data (HBP109XC)**

  - If the reporting information is for a calendar year after **2015**, the **Qualifying Offer Method Transition Relief** check box will disabled and the same field will be labeled as **Reserved** since it is no longer applicable.

  - If you select the **Authoritative Transmittal** check box, the screen now enables all four **Certifications of Eligibility** check boxes if the calendar year is **2015 or earlier**. If the calendar year is **after 2015**, the second check box will be disabled and labeled **Reserved**.

  - The application determines offer of coverage for each employee/month combination based on the updated list and description of indicator codes for employee offer and coverage (Form 1095-C, Line 14) provided by the IRS.

  - The application determines the employee share of lowest premium (Form 1095-C, Line 15) based on the codes **1J** and **1K**.

  - The application determines the Section 4980H Safe harbor Code for each employee/month combination (Form 1095-C, Part II, Line 16) based on the updated 4980H Safe Harbor code

descriptions from the IRS.

- **Manage 1094-C Data (HBM1094C)**

    - If the reporting information is for a calendar year after **2015**, the **Qualifying Offer Method Transition Relief** check box will disabled and the same field will be labeled as **Reserved** since it is no longer applicable.

    - If you select the **Authoritative Transmittal for this ALE Member** check box, the screen now enables all four **Certifications of Eligibility** check boxes if the calendar year is **2015 or earlier**. If the calendar year is after 2015, the second check box will be disabled and labeled **Reserved**.

- **Manage 1095-C Data (HBM1095C)**

    - The label of Line 15 was changed to **15 Employee Required Contribution**. This was previously labeled as "15 Empl Share of Lowest Cost Monthly Prem."

    - The label of Line 16 was changed to **16 Section 4980H Safe Harbor & Other Relief**. This was previously labeled as "15 Applicable Section 4980H Safe Harbor."

- **Manage Benefit Options Offered (HBMOPTOF)**

    - The application now tracks the **Spousal Conditional Offer** value for the Benefit Option offered. This is needed to report codes **1J** and **1K** on Line 14 of Form 1095-C.

        - A new **Spousal Conditional Offer** field on the screen displays the value from the Benefit Plan setup. This drop-down is only available if spousal coverage is offered; the **Dependent Type** field should be set to **Any**, **One**, **Family**, or **Spouse**.

        - A new column (HB_EMPL_BEN_OFFER_LN.spouse_cond_offer_cd) was added for storing the **Spousal Conditional Offer** value.

        - The screen will not allow you to save a record that has **Dependent Type** value of **Any**, **One**, **Family**, or **Spouse** with a **Spousal Conditional Offer** value of **Not Applicable**.

    - The application now stores the 1095-C Reporting - **Override Employee Amount** value in the **Employee Monthly Premium** column (HB_EMPL_BEN_OFFER_LN.empl_prem_amt) if the **Apply Override** check box is selected. This information was required for 2015 1095-C reporting. The **Override Employee Amount** value was previously gathered when generating the 1095-C.

    - A new **Override Applied to Employee Monthly Premium** check box on the screen displays the value from the Benefit Plan setup.

    - A new column (HB_EMPL_BEN_OFFER_LN.ovrd_1095_fl) was added for indicating whether or not the **Employee Monthly Premium** value was gathered from the benefit option's **Override Employee Amount**.

    - When manually entering a record on the screen, the screen displays the benefit option's 1095-C Reporting - **Override Employee Amount** value if the 1095-C Reporting - **Apply Override** check box is selected.

    - The previous **Minimum Value Offered to Employee** check box is now labeled **Provides Minimal Value**. In relation to this update, the name of the ACA_MV_FL column in the Data Dictionary was changed from **Minimum Value Offered to Employee** to **Provide Minimum Value**.

- **Manage Benefit Plans (HBMBPSET)**

    - A new **Spousal Conditional Offer** drop-down list allows you to specify whether the offered spousal coverage is subject to one or more reasonable, objective conditions. This drop-down is only available if spousal coverage is offered (**Dependent Type** field is set to **Any**, **One**, **Family**, or **Spouse**).

    - A Benefit Plan Setup Line (HB_BEN_PLAN_LN) table now has a new column (spouse_cond_offer_cd) for storing the **Spousal Conditional Offer** value.

    - The previous **Minimum Value Offered to Employee** check box is now labeled **Provides Minimal Value**. In relation to this update, the name of the ACA_MV_FL column in the Data Dictionary was changed from **Minimum Value Offered to Employee** to **Provide Minimum Value**.

- **Store Employee Benefit Options Offered (HBPOPTOF)**
  - The application tracks the Spousal Conditional value for the benefit options offered for the reporting of codes **1J** and **1K** on Line 14 of Form 1095-C.
    - The application populates the new **Spousal Conditional Offer** column (HB_EMPL_BEN_OFFER_LN.spouse_cond_offer_cd) based on the value of the same column for the Benefit Plan/Coverage Option/Coverage Offer Start Date combination.
    - The Store Employee Benefit Options Offered Report now displays in the **Spousal Conditional Offer** value in the updated **Dep Req/Dep Type/Spousal Cond** column. The same column was previously labeled "Dep Req/Dep Type."
  - The application now stores the 1095-C Reporting - **Override Employee Amount** value in the **Employee Monthly Premium** column (HB_EMPL_BEN_OFFER_LN.empl_prem_amt) if the **Apply Override** check box is selected. This information was required for 2015 1095-C reporting. The **Override Employee Amount** value was previously gathered when generating the 1095-C. For this update the application performs the following:
    - Store the 1095-C Reporting-Override Employee Amount in the HB_EMPL_BEN_OFFER_LN .empl_prem_amt column if the HB_EMPL_BEN_OFFER_LN.ovrd_1095_fl column value is **Y**.
    - Populate the new HB_EMPL_BEN_OFFER_LN.ovrd_1095_fl column. This will be used to indicate whether or not the Employee Monthly Premium was gathered from the benefit option's **Override Employee Amount**.

Patch Requirements

These enhancements require Costpoint 7.1.1 PATCH3078 and PATCH3099.

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application JAR
PE	EM	AOPESSUE	Activate Pending ESS Benefit Elections	cp711_aopessue_004.jar
PE	HB	HBM1094C	Manage 1094-C Data	cp711_hbm1094c_006.jar
PE	HB	HBM1095C	Manage 1095-C Data	cp711_hbm1095c_006.jar
PE	HB	HBMBPSET	Manage Benefit Plans	cp711_hbmbpset_008.jar
PE	HB	HBMOPTOF	Manage Benefit Options Offered	cp711_hbmoptof_006.jar
PE	HB	HBP109XC	Create 1094-C and 1095-C Data	cp711_hbp109xc_008.jar
PE	HB	HBPOPTOF	Store Employee Benefit Options Offered	cp711_hbpoptof_008.jar

Custom Programs Affected:

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Customer Care at http://support.deltek.com before you install the update.

To Download the HotFix Update:

1. From Internet Explorer, go to https://dsm.deltek.com.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Customer Care Connect credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

To Install the HotFix Update:

Refer to the installation instructions posted on Deltek's Customer Care Connect site, https://deltek.custhelp.com.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.

- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.

- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

To Check to See if the HotFix is Installed:

1. Open the application that was updated.

2. Click **Help** > **About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

More Information:

If you have any questions, please contact Deltek Customer Care at https://support.deltek.com.