

Affordable Care Act

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AFFORDABLE CARE ACT LICENSE

Passport's Affordable Care Act Management ACAMS (ACAMS) facilitating internal reporting and mandatory filings

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INTRODUCTION TO THE AFFORDABLE CARE ACT

Passport provides a means of entering, tracking and reporting Affordable Care Act (ACA) information.

Employers with 50 or more full time equivalent (FTE) employees must file their ACA information with the IRS. If this applies to your company the information in this chapter is relevant to you.

In order to the PBS ACA Management and Reporting features and functions, you must have a PBS license specific to ACA. Access to specific ACA features is controlled by your license. This is explained more fully in the license levels of PBS ACA Management and Reporting section below. If you do not have a license, this chapter does not apply to you. To acquire a license, contact your PBS provider about *PBS ACA Management and Reporting*. The license expires on December 31st. If you acquired an ACA license for the last reporting year, you must renew it before filing for this ACA reporting year.

The Affordable Care Act, ACA for short, is officially called the Patient Protection and Affordable Care Act (PPACA). Sometimes referred to as ObamaCare, ACA reforms the health insurance industry and the American health care system as a whole. The law contains provisions that give Americans more rights and protections and expand access to affordable quality health care to many uninsured employees.

The Affordable Care Act includes a variety of provisions that reform the insurance market and encourage small businesses to offer health insurance. Depending on whether you are an employer with fewer than 50 full time equivalent employees, 50-249 employees, or an employer with 250 or more employees, different requirements of the Affordable Care Act may apply to you.

If you are unsure of the number of your full time employees and full time equivalent employees, the [Monthly Labor Summary](#) report is provided to help you determine this. Run it for a Payroll year to get monthly totals.

To determine how the Affordable Care Act applies to your business, see <https://www.irs.gov/Affordable-Care-Act/Employers>. We highly encourage you to fully research and understand the ACA rules before you start using the PBS ACA features and functions. A misunderstanding of the rules could result in significant IRS penalties. If you have more than 50 full time plus full time equivalent employees you are required to enter ACA data and submit the 1095-C and 1094-C forms to the IRS. PBS Payroll, with the PBS ACA Management and Reporting features, can produce these forms. You may be required to submit ACA information via electronic media.

PBS ACA Management and Reporting is also designed to report data for self-insured companies.

There are four license levels of PBS ACA Management and Reporting

The PBS ACA Management and Reporting solution offers several levels of functionality based on the requirements of ACA for Applicable Large Employers (ALEs), which are the following:

1. ACA Essentials

Company size of 50 to 249 full time employees.

Includes printing of 1094-C and 1095-C validation copies and management reports.

You may print the final 1095-C and 1094-C forms. Order your ACA forms from Trainor Business Forms at <http://trainorprintingandpromotions.com/>. You may also call 800.356.7925. Landscape forms allow more room than portrait forms for printing the *Name of ALE Member* field. You do not have to order Transmittal Form Page 3 (1094-C). This is only for companies with common ownership. Health Coverage Continuation form are only required for employees with more than 6 covered individuals.

This license can be used with multiple company IDs as long as each company has the same FEIN.

An employee can be paid in multiple companies, however, you must designate a reporting company.

2. ACA Corporate Edition

Company size of 250 or more full time employees.

Includes printing of 1094-C and 1095-C validation draft forms, 1095-C copies for employees and management reports.

Provides Magnetic Media electronic filing, including the test submission files required for the TCC application.

This license can be used with multiple company IDs as long as each company has the same FEIN.

An employee can be paid in multiple PBS companies, however, you must designate a reporting company.

3. ACA Enterprise Edition

Allows for an aggregated ALE group of multiple PBS company IDs. This provides for multiple companies with multiple FEINs under common ownership.

Includes printing of 1094-C and 1095-C validation draft forms, 1095-C copies for employees and management reports.

Provides 1094-C and 1095-C Magnetic Media electronic filing with the reporting of members of an aggregated ALE group, including the test submission files required for the TCC application.

Handles data consolidation for multiple EINs.

4. ACA for Accounting & Payroll Service Providers

For Accounting firms and Payroll Service Providers who assist clients with their accounting and end of year State and Federal reporting requirements.

Handles single or multi-company requirements, printing and electronic filing of 1094-C and 1095-C federal forms and includes management reports.

Note: You must license the applicable Essentials / Corporate / Enterprise Edition on a per client basis.

Note

If you were on a Payroll versions prior to v12.02 you do not have certain history files that were added in v12.02. This means that some reports will not have data unless you are looking at dates posted after the 12.03/12.04 update. Starting in 2016, This would only apply when the [Health plan start month](#) is 01 (January).

- If the pre-v12.02 circumstances apply to you and you plan to claim Section 4980H Transition Relief A (50-99) or B (100+), Passport has a special import function to account for the absence of your Time Worked History data. Please contact Passport support for further instructions.
- If the pre-v12.02 circumstances apply, you have an Enterprise License, and you have employee(s) who worked for multiple EINs, we have a special import function to account for the absence of your Time Worked History data. This is required to correctly consolidate multi-EIN reporting. Please contact Passport support for further instructions.

Affordable Care Act Set Up

If you are new to PBS Payroll, you must follow the [Setting Up Payroll](#) instructions in the *Getting Started* chapter. Once this is done and once you have an ACA license, you may start the ACA setup.

The steps for setting up and using PBS ACA Management and Reporting include:

- Enter the *PR Control information* fields that relate to ACA reporting. For an explanation of the fields, see the [Affordable Care Act Tab / Screen](#), [Affordable Care Act \(ALE\) Tab / Screen](#) and [Affordable Care Act \(DGE\) Tab / Screen](#) in the *Control Information* chapter.
- You must have a hire date entered for each current employee and a termination date where appropriate. In the *Employees* chapter see the [Hire date](#) and [Terminated](#) fields. You must also enter a social security number for each employee to be included in the 1095-C reporting.
- Run the [Monthly Labor Summary](#) report to help you determine your number of full time plus full time equivalent employees. If you have 50 or more full time employees you must file the 1095-C and 1094-C forms. This report contains the number of hours worked by employee by month and the total number of full time employees by month for the chosen payroll year.
- Enter ACA groups, as explained in this chapter. You must have at least one ACA group entered
- Enter employee ACA information per the instructions in this chapter. Alternatively you may run the Generate employee ACA information utility. After running this utility, you may have to modify some or all of the employee ACA information records.
- If reporting for multiple company IDs, do the above steps for each company.
- Once the above steps are done you may run ACA reports to determine any adjustments to your data. See the [ACA Reports](#) section. Make data entry adjustments as needed.
- If emailing offers of coverage to your employees, see the [Emailing Setup for Pay Advices and Offers of Coverage](#) section in the *Employees* chapter.

- You may now print the 1095-C and 1094-C draft forms to validate your data. To help in the data validation, you may submit a draft form to each employee along with a short explanation of what the data represents. Have each employee return their draft form with either corrections or an indication that the data is "ok".
- Once you are satisfied with the data, back up your PBS system and generate the final submissions. If you have the essentials license you may purchase the final forms from Trainor Business Forms at <http://trainorprintingandpromotions.com/>. You may also call 800.356.7925. Landscape forms allow more room than portrait forms for printing the Name of ALE Member and other fields. You do not have to order Transmittal Form Page 3 (1094-C). This is only for companies with common ownership. Health Coverage Continuation form are only required for employees with more than 6 covered individuals.
- For Corporate and Enterprise licenses you must apply for an ACA Transmitter Control code with the IRS in order to file your ACA information. For a complete list of steps see [Procedures for 1095-C and 1094-C Electronic Filing](#). Alternatively, to help save you some time, Passport offers a service to submit and E-file on your behalf. Call Passport at 847-729-7900 and ask for more information on submitting an E-file.
- After you back up your PBS system which includes the Payroll (ACA) data, print your 1095-C and 1094-C forms and/or generate the ACA magnetic media from your licensed company and submit the information to the IRS. The form printing and magnetic media instructions are in this chapter. For E-file submission instructions see [AIR](#) (Affordable Care Act Information. Returns). In order to submit a magnetic media E-file you must register to use e-services. You may do this here: https://la1.www4.irs.gov/e-services/Registration/Reg_Online/Reg_RegisterUserForm

ENTER ACA GROUPS

An Affordable Care Act (ACA) group is used to default a Safe Harbor method, define the Standard measurement period and define the Initial measurement period.

An ACA group is assigned to each employee ACA record. You must enter at least one ACA group before you can start entering employee ACA information.

Your company may choose to use a single group with the longest periods allowed by the ACA, which are the default group settings. However, you may find it advantageous to use multiple groups and your own schedules. The ACA rules permit this as long as the criteria are “reasonable”; such as employment type, geographic location, etc.

Select *Enter ACA groups* from the *Affordable care act* menu. The following screen displays:

File View Print Tools Help

Select ACA group

Group	Description	Safe harbor method	Start date

General

Group ID

Group description

Safe harbor method used

Employee default monthly contribution

Health plan start month

Total monthly employee-only premium

Effective month of coverage

Standard measurement period

First stability period start date

Stability period length (month)

Administrative period length (month)

Measurement period length (month)

Initial measurement period

Stability period length (month)

Administrative period length (month)

Measurement period length (month)

ACA Groups List Box

The list box displays up to 6 existing ACA groups at a time. You may sort the ACA groups by Group ID in ascending or descending order. Only columns with red labels may be sorted. To select a field or

change the sort order, click on the column name or the arrow to the right of the column name or use the View options.

To locate an ACA group record, start typing the Group ID. You may also use the up/down arrows, Page up, Page down, Home and End keys to locate an ACA group record. The <F1> and <SF1> keys function the same as the up/down arrow keys.

ACA group records that display in the list box are available for changes or deletion. The fields for the selected ACA group record display in the lower part of the screen.

When an ACA group record is found, you may select the <Enter> key or Edit button to start editing.

ACA Group Buttons

You may select a button or keyboard equivalent for adding, editing, or deleting an ACA group. Here is a list of the functions for each button:

Button	Keyboard	Description
New	Alt+n	To enter a new ACA group.
Delete	Alt+d	To delete the ACA group selected in the list box, You may also select the <F3> key. You cannot delete an ACA group if it is being used in an ACA employee information record.
Edit	Alt+e	To edit the ACA group selected in the list box.
Save	Alt+s	To save a new employee ACA record or changes to an edited employee ACA record.
Save/New	Alt+w	To save the new / edited ACA group record and then start entering another ACA group.
Cancel	Alt+c	To cancel adding or editing an ACA group.
Exit	Alt+x	To exit the screen. You may also use the <Esc> key.

Menu

The menu at the top of the screen has various selections. The File, Tools, View and Help menu selections are standard on every screen. The Print menu selection is unique to this screen and has a sub-menu of Edit list. Selecting Edit list prints the ACA groups.

Character Mode

Affordable Care Act (ACA groups)	XYZ Company
* 1. Group ID	<input type="text"/>
2. Group description	
3. Safe harbor method used	
4. Employee monthly contrib.	
5. Health plan start month	
6. Total monthly employee-only premium	
7. 1st std. stability period start date	
8. Standard stability period length	(month)
9. Standard administrative period length	(month)
10. Standard measurement period length	(month)
11. Initial stability period length	(month)
12. Initial administrative period length	(month)
13. Initial measurement period length	(month)
14. Effective month of coverage	

<F1> = next ACA group, <SF1> = previous ACA group

Enter the following fields:

Group ID

Enter the Group ID.

Format	8 characters
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Group description

This field is not required, but allows you to enter a helpful text description of each Group. For example, "Ohio union employees".

Safe Harbor method used

A Safe Harbor is an IRS approved method of calculating income and is used to ensure that health coverage is affordable. For each group, you will need to determine the affordability of insurance, based on employee *W-2 wages*, hourly *Rate of pay*, or *Federal poverty level*. If you change this value during the year and click Save, it will update all employee ACA records within that Group. Here is an explanation of the calculation of each:

W-2 wages	The employees income is based on Box 1 of their W-2. As you may not know the employees total wages until the end of the year, you will need to plan proactively to make sure the offered coverage corresponds to actual wages instead of mid-year projections. *
Rate of pay	This is the hourly rate times 130 hours per month, times 12 months. Actual hours worked are not factored in. If you cut the employee's wage you are not allowed to use this method. *
Federal poverty level	The default amount is set in the <i>Control information</i> Federal poverty level field. Depending on how much your employees make per year, you may pay more per employee using this method than if you use one of the other methods. *

* Affordability of each of these calculations is based on the *Control information* [ACA Affordability standard percentage](#) field. The more income, the more the employee can afford.

The percentage, monthly hours and poverty level amounts are entered in *Control information* as they are subject to change yearly.

See the IRS regulations for a full explanation of each method.

When the *Safe Harbor method* is changed for the current year, this causes the program to ripple through the employee ACA data and apply a correct matching 2F/2G/2H code.

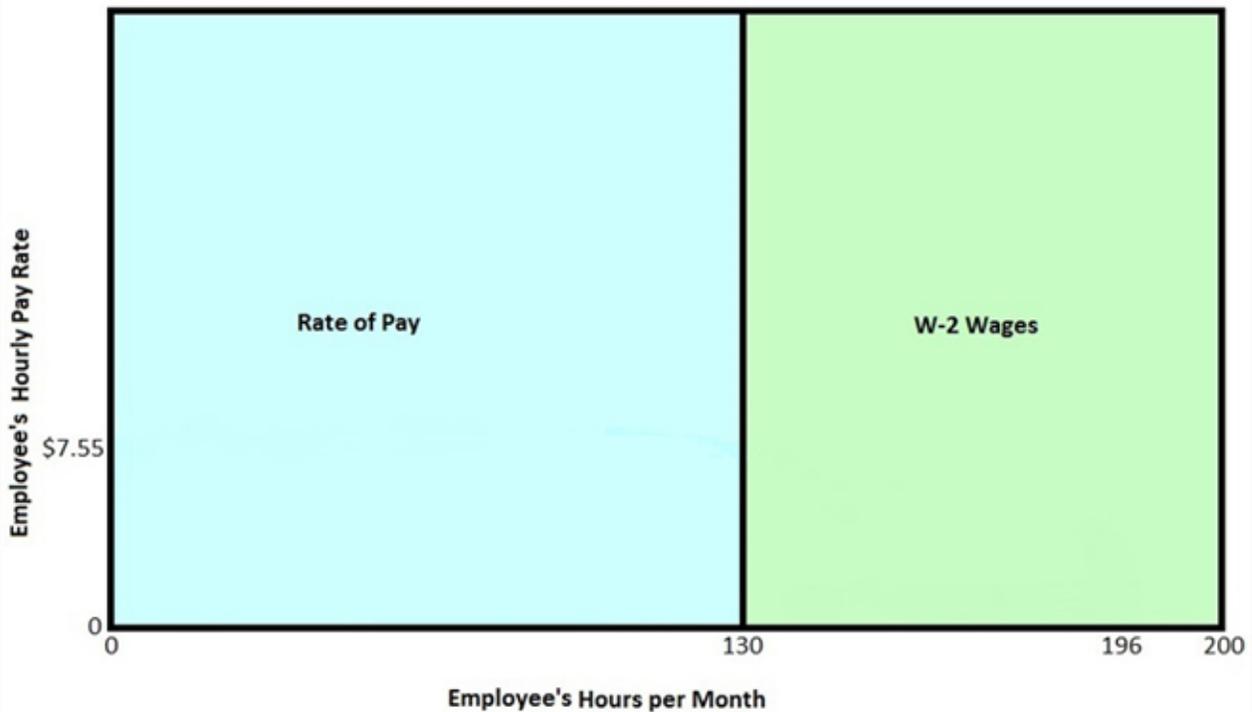
After running the *ACA Insurance report* and *Safe harbor comparison report*, based on the the report totals you may need to adjust this field.

Tips to Maximize Income by Safe Harbor Method

The Federal Poverty Level safe harbor, as set in the *Control information* [Federal poverty level](#) field, is virtually irrelevant since even minimum wage (where you can use the Rate of Pay safe harbor) is higher than that threshold in most states. If we ignore Federal Poverty Level, you are left with this question:

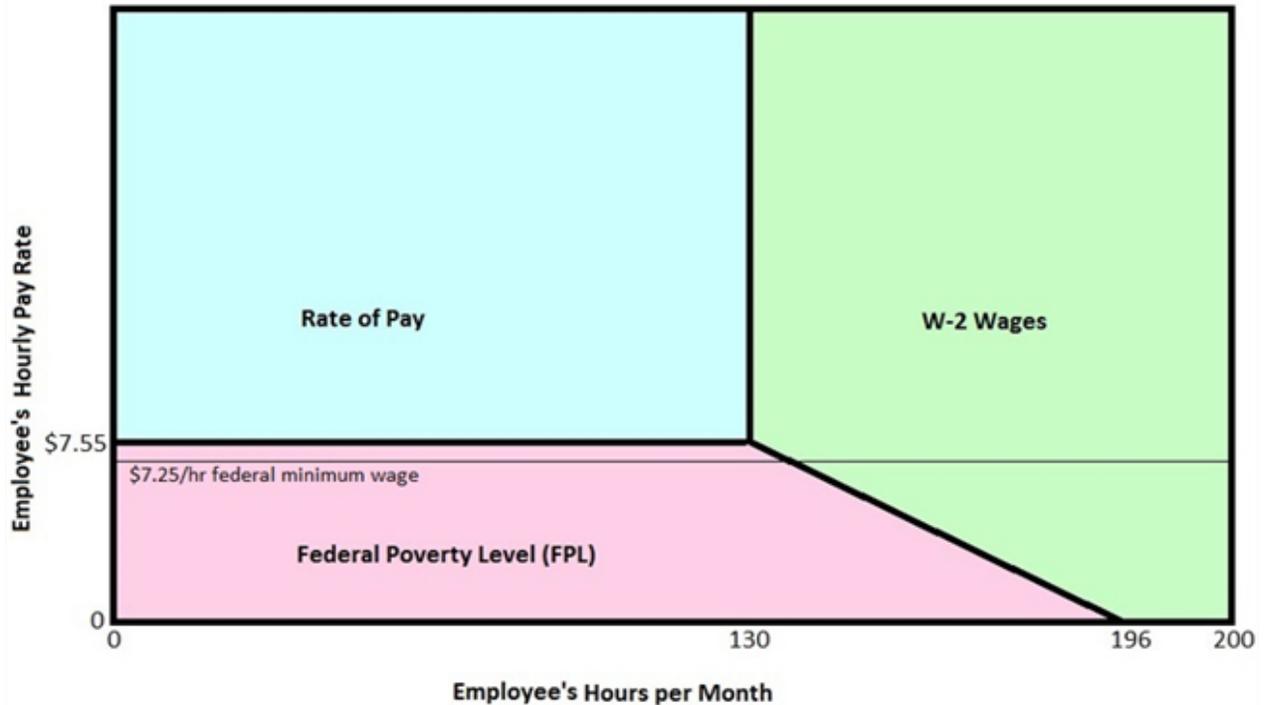
Do you expect the average hours of a full time employee Group to dip below 130 hours per month?

If your employees work 130+, use the *W-2 wages* safe harbor. If they work below 130, use *Rate of pay*. The graph below represents this:



As pictured below, there is a hourly wage window where it is possible for the *Federal poverty level* safe harbor to be advantageous, but that window is extremely narrow. For up to 21 states, the minimum wage

is between \$7.25 and \$7.55 per hour. For employees at that minimum pay level who also work less than 135.4 hours per month, the *Federal poverty level* safe harbor may benefit your company.



Employee default monthly contribution

Enter the contribution amount for minimum self-only coverage that can be used as the default when entering an employee's ACA record.

On the Insurance report this amount, if used for the employee ACA record, is compared to the employee's income to determine affordability.

Health plan start month

For this group, enter the month your insurance health plan starts. For example, for January enter 01, for November enter 10 and so on. This prints on Part II of the 1095-C form. If you change this value during the year and click Save, it will update all employee ACA records within that Group.

Total monthly insurance premium

Enter the premium amount offered for this group. This amount should not include any additional insurance amount paid for the employee's spouse and dependents. It is not a required field and is only used for analysis on the Insurance report. See [Insurance Report](#).

Effective month of coverage

You may choose the First full month, Second full month or Third full month when a new employee's coverage begins.

Following the hire date of a new employee, this is the month that insurance coverage starts. According to ACA rules it must begin no later than the end of three months, however, your policy may state that coverage starts sooner. You may enter the month after which coverage begins.

Standard measurement period (SMP)

An employee is measured in continuous cycles, starting with the first complete cycle after the employee's hire date.

First stability period start date

It is generally most convenient to begin your ACA Stability period on the first of the year, which typically coincides with insurance enrollment. You may select any month, but it must always begin on the first of the month.

Stability period length

The stability period must be between 3 and 12 months and at least as long as the measurement period.

Note

To keep the stability period in sync with the insurance enrollment date, it must be 12 months.

Administrative period length

The administrative period must be between 1 and 3 months, but the total combined length of the administrative period plus the measurement period cannot be greater than 13 months.

Measurement period length

The measurement period must be between 3 and 12 months, but no longer than the stability period. Additionally, the total combined length of the administrative period plus the measurement period cannot be greater than 13 months.

Initial measurement period (IMP)

A new employee begins an IMP the first day of the first complete month worked. The employee completes an entire cycle but commonly begin their first SMP before the IMP stability period ends. When that IMP stability period ends, the employee rolls into the concurrent SMP phase and measurements are counted from its initial start date.

To determine which employees are in the initial measurement period run the [Initial Measurement Period Report](#).

If an employee is intended to be full time the IMP is not required. See regulations for clarification on when to offer insurance. Go to <https://www.irs.gov/affordable-care-act/employers>

Note

Longer periods require less maintenance and attention by the human resources staff.

Stability period length

The stability period must be between 3 and 12 months and at least as long as the measurement period.

Administrative period length

The administrative period must be between 1 and 3 months, but the total combined length of the administrative period plus the measurement period cannot be greater than 13 months.

Measurement period length

The measurement period must be between 3 and 12 months, but no longer than the stability period. Additionally, the total combined length of the administrative period plus the measurement period cannot be greater than 13 months.

GENERATE EMPLOYEE'S ACA INFORMATION

Use this utility to automatically generate employee ACA information for a specific payroll year.

You must enter at least one ACA group ID before you can run this utility.

This utility will generate employee ACA information, writing each record with a specific ACA group, insurance eligible status, insurance offered status, default coverage code, health plan start month and an employee code. As this utility writes the same data for all employees you will probably have to modify at least some of the employee ACA data after running it.

It will also generate data for the ACA FT/PT status, Monthly offer of coverage codes. Employee contribution and Coverage/safe harbor codes. However, it will not generate data before the hire date and after the terminated date, if either of these occur in the selected payroll year. The month after the terminated date the utility writes IH to the Monthly offer of coverage codes and 2A to the Coverage/safe harbor codes. Before you run this utility, make sure your employee's hire and termination dates are accurate for the selected year.

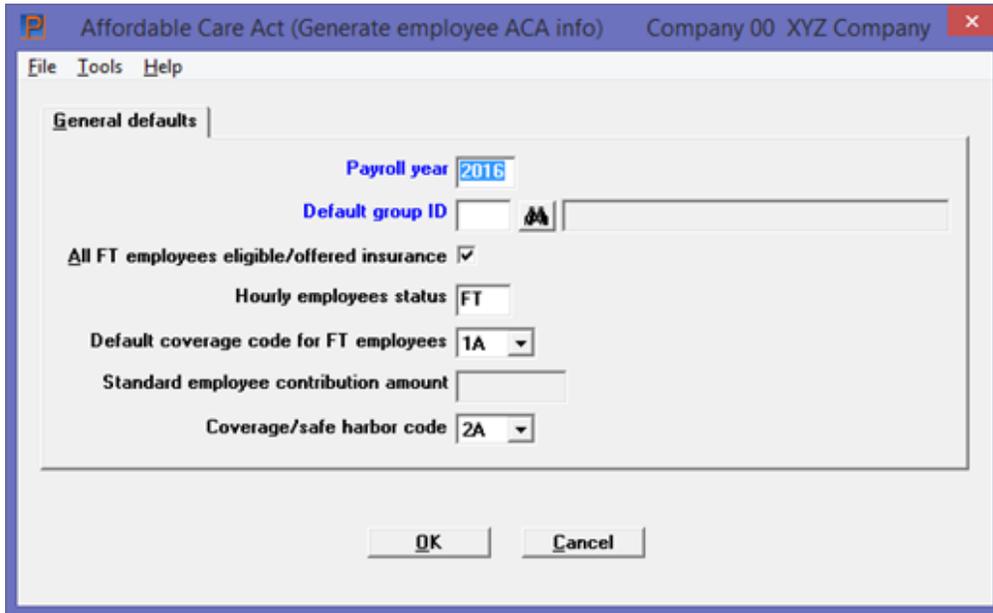
As it only generates new records, it will not overwrite existing employee ACA records for the entered payroll year. After you enter new employees, you may use this utility to add new employee ACA records.

This utility only creates records for hourly or salaried employees. It will not create records for non-employees.

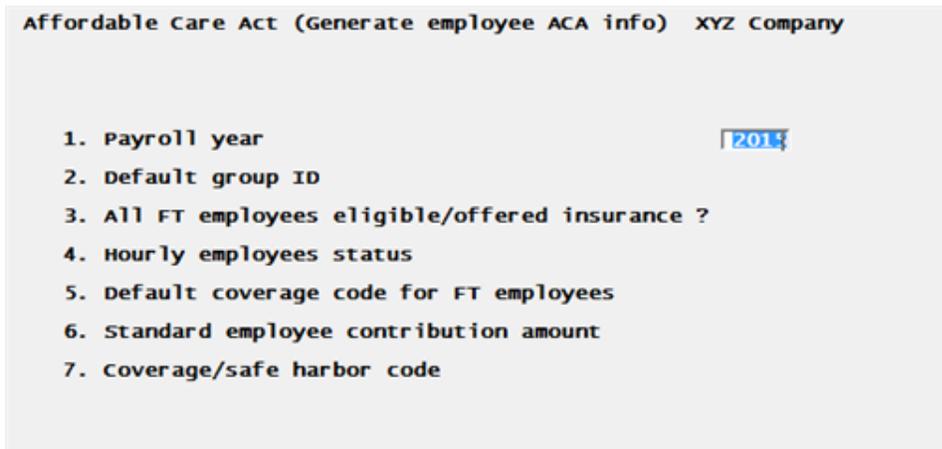
The utility will *not* generate employee ACA records for employees that:

- have a termination date in a prior year
- do not have a hire date

Select *Enter ACA groups* from the *Affordable care act* menu. The following screen displays:



Character Mode



Enter these fields:

Payroll year

Enter the Payroll year to which you want to generate employee ACA data. A *Control information* record must exist for the year. See [ACA payroll year](#).

Default group ID

Enter the ACA group ID you want to use when generating the employee ACA records. If there is only one ACA group ID on file the program defaults to this.

All FT employees eligible/offered insurance

Check the box if you want both the employee eligible field and offered insurance field checked in each employee ACA record.

Hourly employees status

Enter either FT or PT.

Generate each employee ACA record with either a FT (full time) or PT (part time status. If the employee's hire date is mid-year, the months before the hire date will be left blank. If the termination date is mid-year, the months after the termination date will be left blank.

If you leave this field blank, all the months for all the employee ACA records generated will be blank.

Default coverage code for FT employees

Select from the drop down list the coverage code you wish to use for each employee. The code choices are 1A, 1B, 1C, 1D, 1E, 1F, 1G, 1I, 1J or 1K. If the employee's hire date is mid-year, the months before the hire date will be 1H. If the termination date is mid-year, the months after the termination date are written with 1H.

For an explanation of each code, see the [Monthly offer of coverage code](#) field.

Standard employee contribution amount

Enter the employee contribution amount that will be written to each month that the employee worked. If the employee's hire date is mid-year, the months before the hire date will be blank. If the termination date is mid-year, the months after the termination date will be left blank.

For more information see the [Monthly employee contribution](#) field.

Coverage/safe harbor code

Enter the coverage / safe harbor code that will be written to each month that the employee worked. If the employee's hire date is mid-year, the months before the hire date will be left 2A. If the termination date is mid-year, the months after the termination date are written with 2A.

For an explanation of the codes, see the [Coverage/safe harbor codes](#) field in ACA groups.

OK or Cancel

Select OK to generate the employee ACA records and print a report or Cancel to return to the menu without generating any records.

The Generate Employee ACA Information Report prints one line per employee. Each line prints with the employee number, name, department, employee type, hire date and termination date (if any). If a record is created the line also prints *Employee ACA record created*. However, if the employee ACA record already exists, the report prints *Employee ACA record already on file*.

ENTER EMPLOYEE'S ACA INFORMATION

Use this selection to enter data that is reported on the 1095-C *Employer-Provided Health Insurance Offer and Coverage* form and generated in the magnetic media E-file.

The employee ACA information record total is accumulated and prints the 1094-C *Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns* form.

You must have entered at least one ACA group before you can enter employee ACA information.

An employee must have an entered hire date before you can enter ACA information for that employee. If an employee is terminated and rehired in the same year, retain the original hire date and remove the terminated date.

Verify that the employee has a valid social security number entered in *Employees*. If not, the employee will not be included when printing the 1095-C forms or when generating the magnetic media E-file.

If you have an Essentials or Corporate license, an employee can be paid in multiple companies, however, only one company is designated as the reporting company when printing the 1095-C forms or generating the magnetic media E-file. The social security number links an employee from one company to another.

In order to enter employee ACA information for a particular year, there must be a record in *Control information* that matches this year. See [ACA payroll year](#).

Select *Enter employees ACA info* from the *Affordable care act* menu. The following screen displays:

Employee ACA Information List Box

The list box displays up to 6 existing ACA records at a time. You may sort the ACA records by employee number, payroll year or group all in ascending or descending order. Only columns with red labels may be sorted. To select a field or change the sort order, click on the column name or the arrow to the right of the column name or use the View options.

To locate an employee ACA record, start typing an employee number, year or group, depending on which sort field is selected. You may also use the up/down arrows, Page up, Page down, Home and End keys to locate an employee ACA record. The <F1> and <SF1> keys function the same as the up/down arrow keys.

Employee ACA records that display in the list box are available for changes. The fields for the selected employee ACA record display in the lower part of the screen.

When an employee ACA record is found, you may select the <Enter> key or Edit button to start editing.

Employee ACA Information Buttons

You may select a button or keyboard equivalent for adding or editing an employee ACA record. Here is a list of the functions for each button:

Button	Keyboard	Description
New	Alt+n	To enter a new employee ACA record.
Delete	Alt+d	To maintain an audit trail of ACA records, deletion is not available. Change the employee ACA record from (FT) Full time to (PT) part time and their record will not be printed or generated in the ACA E-file.
Edit	Alt+e	To edit the employee ACA record selected in the list box.
Save	Alt+s	To save a new employee ACA record or changes to an edited employee ACA record.
Save/New	Alt+w	To save the new/edited employee ACA record and then start entering another employee ACA record.
Covered individuals	Alt+v	This button can only be accessed if your company is self-insured, per the Self-insured employer field in <i>PR Control information</i> . Click this button to access the Covered Individuals Entry screen.
Cancel	Alt+c	To cancel adding or editing an employee ACA record.
Exit	Alt+x	To exit the screen. You may also use the <Esc> key.

The menu at the top of the screen has various selections. The File, Tools, View and Help options are standard on every screen. The Print menu has an Edit list selection, unique to this screen which will print the employee ACA records.

Character Mode

```

Affordable Care Act (Enter employees ACA info)   XYZ Company
* 1. Employee #           
* 2. Payroll year
* 3. ACA group
4. Insurance eligible ?           offered ?
5. Employee code
6. Plan start month           Month: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
7. ACA FT/PT status
8. offer of coverage codes
   (form 1095-C, line 14)
9. Coverage/safe harbor codes
   (form 1095-C, line 16)
10. Employee contribution (form 1095-C, line 15)
      January   February   March   April   May   June
          July   August   September   October   November   December
<F1>=next empl ACA, <SF1>=prev empl ACA, <F2>=next empl, <SF2>=prev empl
    
```

Using character mode, field 9 *Coverage/safe harbor codes* and field 10 *Employee contribution* are reversed as compared to graphical mode.

Enter the following fields:

Employee

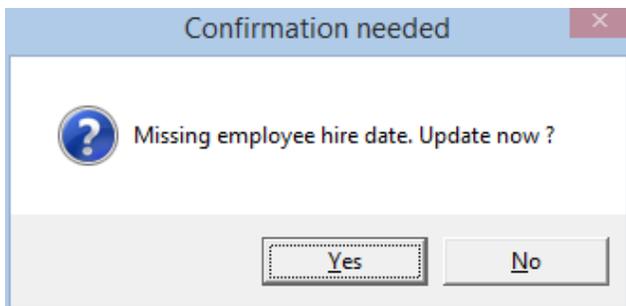
Enter the employee number. You may select the lookup to find the employee. You may also modify or add new employees by accessing Employees maintenance from the lookup when you select the *Employees* button.

After you enter the employee number the employee's hire date and termination date, if terminated, display. The Salaried or Hourly pay type also displays.

Using character mode you have the following options:

<F1>	For the next employee ACA record on file, in employee number sequence.
<SF1>	For the previous employee ACA record on file.
<F2>	For the next employee on file, in employee number sequence.
<SF2>	For the previous employee on file.
<F3>	To maintain an audit trail of ACA records, deletion is not available. Change the employee ACA record from (FT) Full time to (PT) part time and their record will not be printed or generated in the ACA E-file.

If the employee does not have a hire date and you have permission to access the *Employees* menu selection, you will see a message like this:

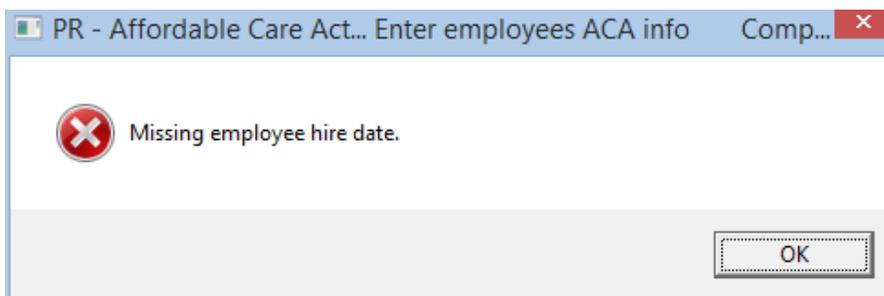


Missing employee hire date. Update now ?

Select Yes and the *Employees* windows displays with the cursor on the *Hire date* field. You may enter a hire date. Enter a hire date and save the change. You may then proceed with the entry of an Employee ACA info record.

If you do not want to enter a hire date you can Cancel entry from the *Employees* window and return to the Enter employees ACA info screen where you will have to cancel the entry.

If you do not have permission to access the *Employees* menu selection you will see this message:



You must ask another PBS user, who has permission to access the *Employees* menu selection, to enter a hire date for the employee. Then you may enter the employee ACA record.

Linux Telnet Mode

When using PBS in Linux Telnet, if a hire date is missing, you must enter it using the *Employees* menu selection. Telnet does not allow opening a second window.

Payroll year

Enter the payroll year. This defaults to the current year. A *Control information* Affordable Care Act record must exist for the year. See [ACA payroll year](#) in *Control information*.

Reporting company ID

If an employee works in more than one company, has an employee record for each, and each company has the same EIN, enter the company number for reporting the ACA information. You must enter the number in each company.

Insurance eligible

This is the insurance eligibility status of the employee. The *ACA Insurance Report* and *Elig. and Ins. offerd. report* will use it to help you monitor ACA compliance for all employees.

Insurance offered

This is the current offered insurance status of the employee. The *ACA Insurance Report* and *Elig. and Ins. offerd. report* will use this setting to help you monitor ACA compliance for all employees.

The [Offer of coverage notice](#) from *Control information*, is printed on the employee's graphical check stub and graphical direct deposit mailer if the employee has an Employee ACA record for the current year and this Insurance offered field is checked.

Employee code

When counting and determining full time employees, the Affordable Care Act allows exemptions for company owners, shareholders, or [Seasonal Employees](#). Select from the codes either Owner, Family, Shareholder, or Seasonal as appropriate. Use Regular for employees who do not fit into any of the above.

In character mode, enter either F = Family, H = Shareholder, O = Owner, R = Regular or S = Seasonal.

ACA Group

Choose an ACA group code as entered in the *Enter ACA groups* menu selection. If only one group has been entered this field defaults to that group.

If an ACA group description has been entered for the group, the description displays to the right of the code.

You have the following options:

<F1>	For the next ACA group file
<SF1>	For the previous ACA group

Health plan start month

Enter the health plan start month. Enter 01 through 09 or 10, 11 or 12. The numbers represent 01 = January, 02 = February, 03 = March, 04 = April, 05 = May, 06 = June, 07 = July, 08 = August, 09 = September, 10 = October, 11 = November and 12 = December.

ACA FT/PT status

Based on the ACA settings entered in the *Control information*, for each month, enter the employee as full time (FT), part time (PT) or leave *blank* for not employed. After completing one or more monthly entries, use the <F1> key to repeat that entry for each of the remaining months for the year.

If your company self-insures and a part time employee is covered, you must identify that employee as “FT” for one month of their Employee ACA record in order to trigger printing a 1095-C which provides the required Covered Individual information.

Note

Series 1 and 2 Codes

Enter a code for every calendar month possible even if they were not employed at that time. Coverage codes only apply if coverage is offered every day of a month. If you offer coverage on the 2nd, it is not recorded until the following month. Likewise, if an employee terminates coverage before the last day of a month, there is no offer of coverage for that month. These codes are subject to change by the IRS at any time. For a more complete description and to confirm the accuracy of your entries, refer to the IRS website at

<https://www.irs.gov/instructions/i109495c/ar01.html>

Monthly offer of coverage code

This determines an employee’s coverage offer. Enter the Series 1 code of 1A, 1B, 1C, 1D, 1E, 1F, 1G, 1H, 1I, 1J or 1K. Below there is an explanation of each series 1 code. You should also refer to the [IRS 1095-C instructions for Line 14](#) for any changes or additions to codes.

After completing one or more monthly entries, use the <F1> key to repeat that entry for each of the remaining months for the year.

The ACA regulations consider Dependents to be exclusive of Spouses.

Series 1 Codes. 1095-C line 14/Employee ACA record

- 1A. Qualifying Offer: Offer of affordable [Minimal Essential Coverage \(MEC\)](#) providing [Minimum Value](#) to the full time (FT) employee and at least MEC offered to spouse and dependent(s).

Important: Before you use Code 1A, note that it differs from 1B-1E. 1A applies when the [Applicable Large Employer \(ALE\)](#) member meets the certification guidelines and checks box A on line 22 of the summary transmittal form (1094-C). Also, with the 1A certification, no contribution amount is entered on line 15. You may not use code 1A if the monthly employee contribution amount is greater than \$93.18. As this amount may change from year to year, review the IRS documentation for confirmation.

Code 1A may not be available on your system. See [A. Qualifying Offer Method](#) field in *Control information*.

- 1B. MEC providing minimum value offered to employee only.
- 1C. MEC providing minimum value offered to employee and at least MEC offered to dependent(s) (not spouse). You may use code 1C even for an employee who does not have dependents.
- 1D. MEC providing minimum value offered to employee and at least MEC offered to spouse (not dependent(s)). You may use code 1D even for an employee who does not have a spouse.
- 1E. MEC providing minimum value offered to employee and at least MEC offered to dependent(s) and spouse. As noted above, this is the code you would use instead of 1A if you are reporting the cost of monthly coverage on line 15. You may use code 1E even for an employee who does not have a spouse or dependents.
- 1F. MEC NOT providing minimum value offered to employee or any combination of spouse or 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.
- 1H. No offer or non-qualifying offer of coverage.
- 1I. Qualifying Offer Transition Relief was only used for 2015.
- 1J. Same as 1D except conditionally offered to the spouse.
- 1K. Same as 1K except conditionally offered to the spouse.

Note

In character mode the next two groups of fields are reversed.

Monthly employee contribution

If you have entered a Coverage code of 1B, 1C, 1D, or 1E above, enter the employee's share for Monthly employee contribution (MEC) self-only coverage. All other coverage codes will preclude entries in this section. After completing one or more monthly entries, use the <F1> key to repeat that entry for each of the remaining months for the year.

You may use <F2> to use the default contribution amount from the [Employee default monthly contribution](#) field as entered in the ACA group which has been assigned to this employee. If the group has a contribution amount of zero, there is no default offered for this field.

Note

These do not correspond to actual paid amounts. These are only what an employee would theoretically pay for basic coverage (minimum essential coverage), which determine the Federal *affordability* standard. Employees may elect for increased and more expensive coverage.

Coverage/safe harbor codes

Enter the safe harbor Series 2 code from the list below. After completing one or more monthly entries, use the <F1> key to repeat that entry for each of the remaining months for the year.

To help you decide which code to enter, refer to the list below. These codes could be altered or added to by the IRS at any time, so also refer to the IRS 1095-C instructions for Line 16.

Note

Blank is an acceptable entry for line 16, but confirm that none of the others below apply.

Series 2 Codes. 1095-C line 16/Employee ACA record

- Blank is an acceptable entry for line 16, but confirm that none of the others below apply. This will print as blank on the 1095-C form.
- 2A. Employee not employed during any day of the month.
- 2B. Employee not a full time employee and did not enroll in MEC, if offered for the month. Enter code 2B also if the employee is a full time employee for the month and whose offer of coverage (or coverage if the employee was enrolled) ended before the last day of the month solely because the employee terminated employment during the month (so that the offer of coverage or coverage would have continued if the employee had not terminated employment during the month). Also use this code for January if the employee was offered health coverage no later than the first day of the first payroll period that begins in January.
- 2C. Employee enrolled in coverage offered. Enter code 2C for any month in which the employee enrolled in health coverage offered by the employer for each day of the month, regardless of whether any other code in Code Series 2 might also apply (for example, the code for a section 4980H affordability safe harbor).
- 2D. Employee in a section 4980H(b) Limited Non-Assessment Period. If an employee is in an [Initial Measurement Period \(IMP\)](#), enter code 2D, and not code 2B. For an employee in a section 4980H (b) Limited Non-Assessment Period for whom the employer is also eligible for the multi-employer interim rule relief for the month code 2E, enter code 2E and not code 2D.
- 2E. Multi-employer interim rule relief. Enter code 2E for any month for which the multi-employer interim guidance applies for that employee.

Codes 2F through 2H

Note

Although employers may use the section 4980H affordability Safe harbors to determine affordability for purposes of the multi-employer interim guidance, an employer eligible for the relief provided in the multi-employer interim guidance for a month for an employee should enter code 2E (multi-employer interim rule relief), and not a code for the section 4980H affordability Safe harbors (codes 2F, 2G, or 2H). If an employer uses one of these harbors for an employee, it must be used for all months of the calendar year.

- 2F. Enter code 2F if the employer used the section 4980H Form W-2 (wage) safe harbor to determine affordability.
- 2G. Enter code 2G if the employer used the section 4980H federal poverty line safe harbor to determine affordability.
- 2H. Enter code 2H if the employer used the section 4980H rate of pay safe harbor to determine affordability.
- 2I. Non-calendar year transition relief applies to this employee. Enter code 2I if the 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 and Section 4980H(b) Transition Relief for Employers with a Non-Calendar Year Plan.
- A blank Series 2 Code is a valid option in rare cases where nothing else applies.

Code Relationships

You may enter **1A** for a full-time employee, only if you are using the Qualifying Offer Method (indicated in *Control information*).

Line 15 Contribution amounts are not reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for Federal Poverty Level, or **2H** for Rate of Pay) which matches the [Safe Harbor method used](#) in the employee's Group.

You may use **1B** for any month where qualifying coverage was offered to the employee only.

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

You may use **1C** for any month where qualifying coverage was offered to the employee and dependent(s) but not a spouse.

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

You may use **1D** for any month where qualifying coverage was offered to the employee and spouse (unconditional) but not a dependent(s).

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

You may use **1E** for any month where qualifying coverage was offered to the employee, spouse (unconditional), and dependents.

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

Important Tip: For the ALE Member, if coverage is available to the spouse and dependent(s) of every full-time employee you may use code **1E** instead of **1B/1C/1D** for everyone who is offered insurance, even employees who are unmarried or without dependents.

Use **1F** for any month where **non-qualifying coverage** was offered to the employee and any combination of spouse and dependents.

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

You may use **1G** if the company is self-insured and the employee was offered coverage but was not FT for any month. **1G must be All 12 Months or not at all.**

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

Use **1H** if no offer of coverage was made.

Line 15 Contribution amounts are not reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

You may use **1J** for any month where qualifying coverage was offered to the employee and conditionally to the spouse, but not to dependent(s).

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

You may use **1K** for any month where qualifying coverage was offered to the employee and dependents and conditionally to the spouse.

Line 15 Contribution amounts are reported.

Line 16 code options are restricted to **2C** (enrolled in coverage), **2E** (multi-employer interim rule relief), or the waived coverage choice (**2F** for W-2, **2G** for FPL, or **2H** for Rate of Pay) which matches the Safe Harbor in the employee's Group.

Covered Individuals Entry

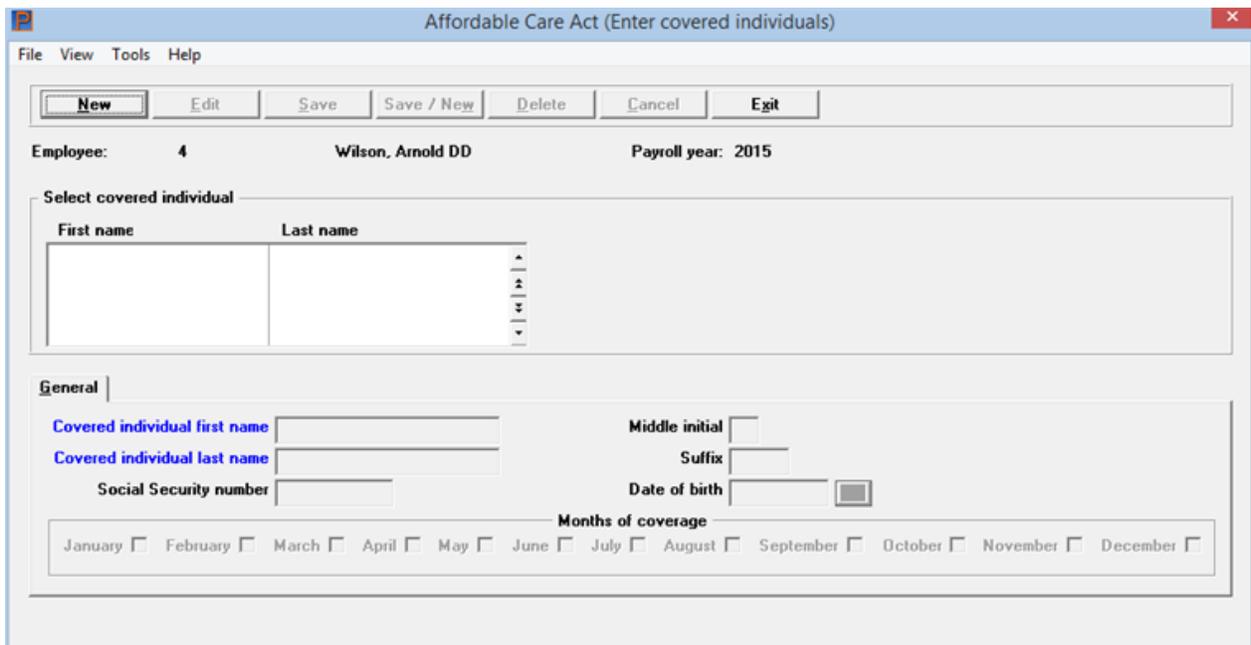
This screen should only be used if your company is self-insured. In order to access this screen, you must check the box for the [Self-insured employer](#) field in *PR Control information*.

Use this screen to enter the individuals, including the employee, that are covered under your companies self-insurance. Covered Individuals will print on Part III of the 1095-C form and depending on your license type, will be generated in the magnetic media E-file.

For self-insured companies the employee must be listed, along with their spouse/dependents, on the Covered Individuals section of the employee's ACA record. For the employee their Social Security number must be used. Their spouse/dependents must use their Social Security number OR Date of Birth.

In Graphical mode only, if no covered individual has been listed for an employee, the fields for First Name, Last Name, and SSN, along with Months of coverage corresponding to 2C entries on Line 16, will pre-fill. Simply clicking Save will add the employee to the list.

The following screen displays:



Covered Individuals List Box

The list box displays up to 6 existing covered individual records at a time. You may sort the covered individual records by first name, in ascending or descending order. Only columns with **red** labels may be sorted. To select a field or change the sort order, click on the column name or the arrow to the right of the column name or use the View options.

Covered individual records that display in the list box are available for changes or deletion. The fields for the selected covered individual record display in the lower part of the screen.

When a covered individual record is found, you may select the <Enter> key or Edit button to start editing.

Covered Individual Buttons

You may select a button or keyboard equivalent for adding, editing, or deleting a covered individual record. Here is a list of the functions for each button:

Button	Keyboard	Description
New	Alt+n	To enter a new covered individual record.
Delete	Alt+d	To delete the covered individual record selected in the list box, You may also select the <F3> key. The delete option will not be available in future releases.
Edit	Alt+e	To edit the covered individual record selected in the list box.

Button	Keyboard	Description
Save	Alt+s	To save a new covered individual record or changes to an edited covered individual record.
Save/New	Alt+w	To save the new/edited covered individual record and then start entering another covered individual record.
Cancel	Alt+c	To cancel adding or editing an covered individual.
Exit	Alt+x	To exit the screen. You may also use the <Esc> key.

Character Mode

```

Affordable Care Act (Enter covered individuals)  XYZ Company
Employee # 4      Wilson, Arnold DD      Payroll year 2015
1. Covered individual first name |          Middle initial
2. Covered individual last name      Suffix
3. Social Security Number
4. Date of birth
      Month: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
5. Months of coverage

<F1> = next covered individual, <SF1> = previous covered individual
    
```

Enter the following fields:

Covered individual first name

Enter the first name of the individual covered under the employee's insurance.

Middle initial

Enter the middle initial of the covered individual. This field is optional.

Covered individual last name

Enter the last name of the individual covered under the employee's insurance.

Suffix

Enter the suffix of the covered individual. This field is optional.

Social Security number

Enter the Social Security number of the covered individual.

You may leave this field blank. If you do, you must enter the date of birth.

Social Security numbers are prone to identity theft. Passport helps to secure this field by encrypting the number in the file and following the entry of the field, only displaying the last four digits of the number.

As this field is optional, to eliminate the risk, you may want to enter the date of birth rather than the social security number.

Date of birth

Enter the date of birth of the covered individual.

You may leave this field blank. If you do, you must enter the Social Security number.

Months of coverage

January February March April May June July August September October November December

Check the boxes of the months where the individual was covered. This normally corresponds to the same months the employee is covered. Select the <F1> key to select all the months. Use the <F2> key to not select or unselect all the months.

MASS UPDATE EMPLOYEE ACA INFORMATION

This program updates employee ACA data.

You can filter on Group, Department, Starting / Ending employee and FT or PT status. You also enter the selected month through the end of that year. For the employee ACA data, the program updates Lines 14, 15, 16, the Insurance Eligible field and the Insurance offered field. If using the self-insured option, the months of coverage are updated as well.

Select *Mass-update empl. ACA info* from the *Affordable Care Act* menu.

File Tools Help

Report criteria

Group ID 

Department

Starting employee number 

Ending employee number 

FT/PT status

Effective month of change

Field to change

Offer of coverage code

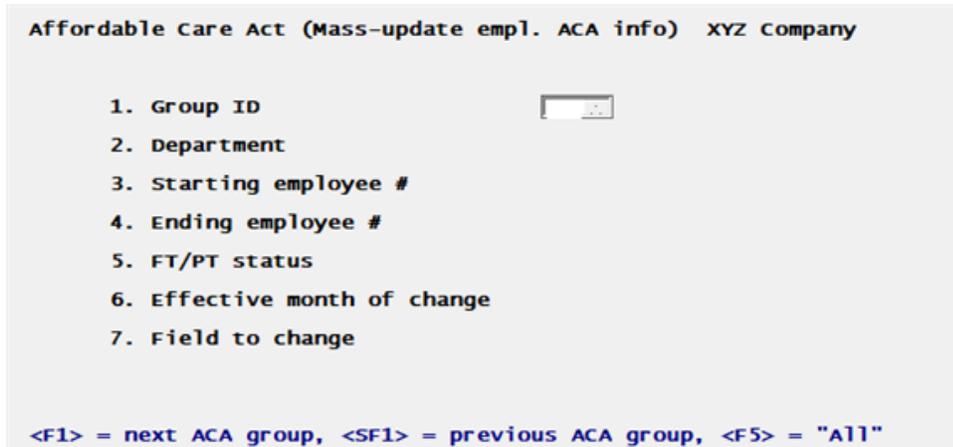
Employee contribution Amount

Coverage/safe harbor code

Insurance eligible

Insurance offered

Character Mode



Enter the following fields:

Group ID

Enter the ACA group ID you want to use when generating the employee ACA records. If there is only one ACA group ID on file the program defaults to this. You may use one of the options:

<F1>	For the next ACA group
<SF1>	For the previous ACA group
<F5>	For "All" groups

Department

Any input is accepted; however, only a valid department already entered in the *Employees* selection is meaningful. You can also use the option:

<F5>	For "All" departments
------	-----------------------

Starting employee number

Enter the starting employee number.

You may use the option of <F2> for the "First" employee number or <F8> to find the employee via the lookup.

Ending employee number

Enter the ending employee number.

You may use the option of <F2> for the "Last" employee number or <F8> to find the employee via the lookup.

FT/PT status

Enter the status of either FT for full time or PT for part time.

Effective month of change

Select any month from January to December.

Field to change

Your choices are the following:

Character	Graphical
1	Offer of coverage code (line 14)
2	Employee contribution (line 15)
3	Coverage/safe harbor code (line 16)
4	Insurance eligible
5	Insurance offered

Offer of coverage code

This field is only available if you select *Offer of coverage code (line 14)* for the *Field to change* field. You may select either 1B, 1C, 1D, 1E, 1F, 1H, 1J or 1K.

Employee contribution amount

This field is only available if you select *Employee contribution (line 15)* for the *Field to change* field.

Enter the employee contribution amount as dollars and cents or as a percentage of the employee’s hourly rate. Employee records which have no hourly rate will be bypassed by this function.

Coverage/safe harbor code

This field is only available if you select *Coverage/safe harbor code (line 16)* for the *Field to change* field. You may select either 2C, 2E, 2F, 2G, 2H or blank.

Insurance eligible

This field is only available if you select *Insurance eligible* for the *Field to change* field. Check the box to update the employee ACA records with insurance eligible.

Insurance offered

This field is only available if you select *Insurance offered* for the *Field to change* field. Check the box to update the employee ACA records with insurance offered.

OK or Cancel

Select OK to update the employee ACA records and print a report or Cancel to return to the menu without generating any records.

The Mass-Update Employee ACA Information Report prints the employee number, name, department, employee type, hire date and termination date (if any) and the changed data. If a record is created the line also prints *Employee ACA record updated*.

ACA REPORTS

ACA reports are used to verify and validate your data before you print and submit the 1095-C and 1094-C forms or ACA magnetic media.

Print ACA groups

This report will list all ACA Groups you have entered, including their name, description, safe harbor method, original Stability Period starting date, and the length of each phase (measurement, administrative, stability) in the Standard measurement period and Initial measurement period cycles.

Select *Print ACA groups* from the *Affordable Care Act* menu.

There is no limitation so all groups will print. You will be asked to select a printer.

Print Employee's ACA Information

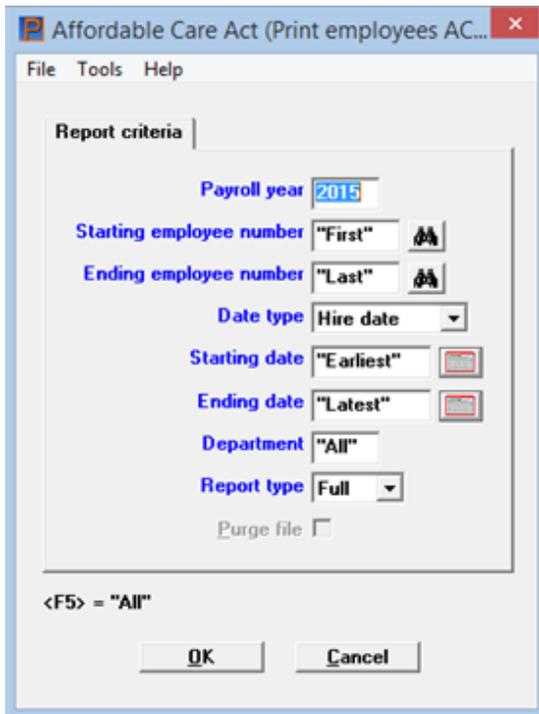
This report prints a list of a range of employees with their ACA information as entered via the *Enter employees ACA info* menu selection.

There is an option to purge the employee ACA data, however, the employee ACA data may only be purged three years after the *Payroll year* date.

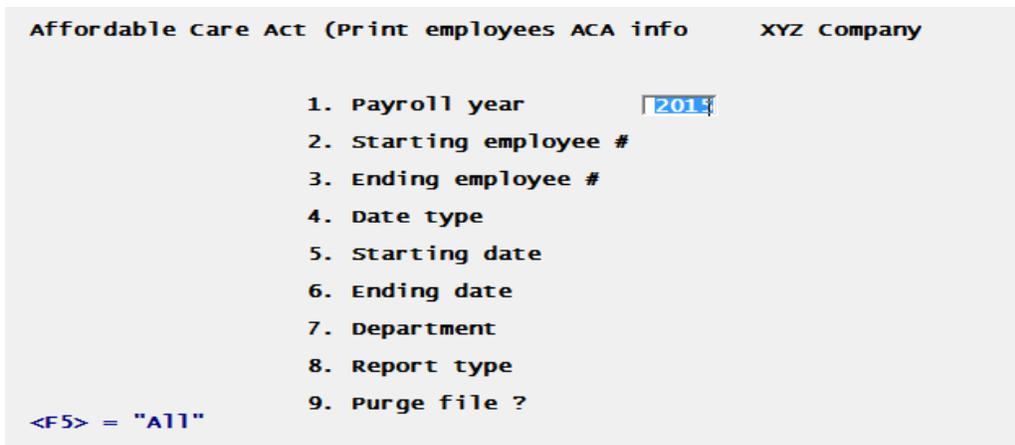
If you are a self-insured company and the employee ACA records have associated Covered individual records, when selecting to print the full report type, they will print as well.

Select

Print employees ACA info from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Enter the following fields:

Payroll year

Enter the calendar year. You may use the option of <F5> for "All" years.

Starting employee number

Enter the starting employee number.

You may use the option of <F2> for the "First" employee number or <F8> to find the employee via the lookup.

Ending employee number

Enter the ending employee number.

You may use the option of <F2> for the "Last" employee number or <F8> to find the employee via the lookup.

Date type

Select the date type of *Hire date*, *Termination date*, *No hire date*, or *None*. In character mode enter either N = None, H = Hire date, M = No hire date or T = Termination.

All employees must have a hire date. An employee ACA record cannot be entered without one.

Selecting Termination date only includes those employees with a set termination date and within the date range selected. In other words, non-terminated employees are not included.

Starting date and Ending date

Enter the starting and ending date range.

Depending on what you selected in the *Date type* field, the date entered is either the starting hire date or starting termination date.

Selecting <F2> for "First" to "Last" is not recommended as it prints all employee records even if they do not have a hire date or termination date.

Department

Enter the department or select <F5> for "All" departments.

Report type

Select either *Full* or *Brief*. Full prints all the employee ACA information including data for each month. Brief prints one line per employee with no monthly information.

If you are a self-insured company and the employee ACA records have associated Covered individual records, selecting to print the full report prints the employee's Covered individual records as well.

Purge file

The employee ACA data may be purged three years after the *Payroll year* date. This field becomes active in 2017 and then you may purge data with a 2014 *Payroll year*. In 2018 you may purge 2015 data and so on.

If you are a self-insured company and the employee ACA records have associated Covered individual records, selecting to purge removes the employee's Covered individual records as well.

Refer to IRS Publication 5165 for the number of years that data should be retained. Until that time you may delete individual employee ACA records manually under *Employee ACA info*.

OK or Cancel

Select OK to display a list of printers and print the report. Select Cancel to return to the menu without printing a report.

If you selected to purge the data there is a period of processing while the data is being removed.

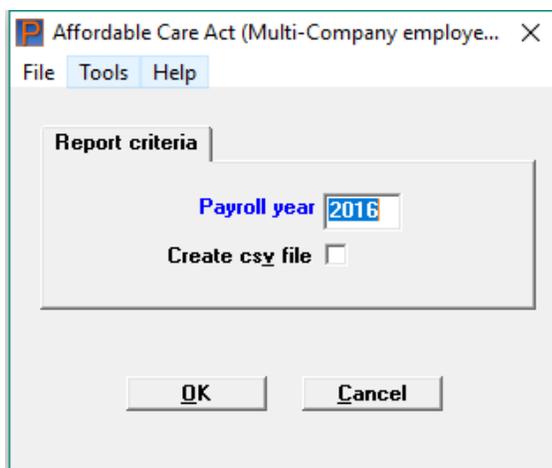
Multi-Company Employee Hours Consolidation

The Multi-Company Employee Hours Consolidation report has no function for single company users.

The Initial Measurement Period and Standard Measurement Period reports function according to ACA Group parameters at the company level. The Multi-Company Employee Hours Consolidation report is designed to help ensure that employees who work for more than one company are not overlooked when determining part-time/full-time status (per IRS guidelines on combining hours). This report functions independently of ACA Group settings and displays the per-company and combined total monthly hours for any employee who works for more than one company (based on a matching Social Security number).

The user must select a calendar year for this report. There is an option for a .CSV output which is helpful if you would like to create a custom average function encompassing your months of measurement.

Select *Mlt-comp Emp hours consol* from the *Affordable Care Act* menu. The following screen displays:



Enter the following fields:

Payroll year

Enter the payroll year. The year defaults to the system year.

Create csv file

Check this box to generate a csv file output and print the report. Leaving the box unchecked will only print the report. Running the report on a Windows or Thin client system generates a CSV file automatically and launches your default system program which opens the CSV file. Using Linux/UNIX telnet the program saves the CSV file to the ACACSV directory under the top-level PBS directory, however, the program does *not* automatically launch a system CSV program.

If you want to keep this data confidential, only allow users that can create this Payroll csv output to have access to the folder where you store the file.

The file is named similar to this:

00_Employee_Hours_Consolidation_Report_2019_20191104_15012505.csv

In the example above, 00 is the company ID. *Employee_Hours_Consolidation_Report* is the name of the report, 2019 is the reporting year selected and 20191104_15012505 is the date and time it was created.

OK or Cancel

Select OK to display a list of printers or Cancel to return to the menu without printing.

If you checked the box for creating a csv file you will also be asked to select a location for the file. You may change the default file name to any name you like.

Insurance Report

The *Insurance report* provides employee / employer insurance contribution information and helps you determine:

- if your company contributions to health care plans are appropriate
- if paying a penalty for any employee is more cost effective than paying the employee's share of the insurance premium

This report defaults to the current year based on the system date. Also, the report uses employee ACA status information only for the month the report is run.

Only employees with an employee ACA record for the current year will print on this report. Employees that are terminated do not print on the report.

You may print all employees or only employees who have been offered coverage, full time, part time or both ACA statuses. You may print employee from a department or "All" departments. You may create a csv output file.

For each row, the report prints the employee number and employee name. It also prints the following columns:

Report column name	Description
ACA status	The status is either FT = full time, PT = part time or blank. The status that prints is determined by the month the report is run and what is entered in the employee ACA info FT/PT status field for that month. If the employee does not have a termination date and nothing was entered in the Employees ACA info FT/PT status field, this field will print as blank. A terminated employee will not print on the report. If the system year is greater than the payroll year, it uses the value for December of the payroll year.

Report column name	Description
Safe Harbor adj. gross income	It uses an employee's projected annual gross wages, per their Group-assigned Safe Harbor method, to print this amount. The projected gross is determined from the employee's Salary or, if hourly, the regular hourly rate calculated over a year.
Max. affordable Emp. contrib.	To print the maximum affordable employee insurance contribution column, it takes the Safe Harbor adjusted gross amount, multiplied by the ACA Affordability standard percentage , as entered in PR <i>Control information</i> .
Emp. share of MEC offered	This column is the projected annual cost of the Minimum Essential Coverage (MEC) offered, as entered in the employee ACA record <i>Employee contribution</i> monthly fields. If the amount changes for any month during the year, the highest monthly amount is used to calculate the annual value.
Minimum employer contrib.	This column prints the result of the <i>Cost of MEC offered</i> column amount minus the <i>maximum affordable employee insurance contribution</i> giving the minimum amount the employer is expected to pay
Total insurance premium	This column is the annual amount of the insurance premium taken from the Total monthly employee-only insurance premium in the employee's group.
Required Employer %	<p>This takes the Maximum affordable Employee contribution divided by the Total insurance premium and displays the remainder as the percentage an employer must pay in order for each employee's coverage to remain affordable. 0% indicates that if necessary, an employee could afford the entire premium on their own.</p> <p>Example of use: Analyzing the highest percentages in this report will help you gauge the best levels for contributing to employee health plans. You may be currently paying 70% of insurance premiums, however, this report could tell you the highest required percentage is 57%. This means you could lower the company share from 70% to 60% and everyone's offer would remain affordable. Conversely, if the report reveals one employee's requirement to be 72%, you could either raise the company contribution for everyone to that percentage, give that individual employee a raise to bring the percentage below 70 or consider other alternatives.</p>
Coverage penalty?	If the above minimum employer contribution amount is greater than the Employer contribution threshold amount, as entered in PR <i>Control information</i> , this column prints as <i>Yes</i> . Otherwise, it prints as <i>No</i> .

When *Coverage penalty?* column prints as *Yes*, you may consider paying the penalty vs. the employer's share of the insurance amount.

Notes on When to Run the Insurance report and Insurance Eligible/Offered report

The nature of the Insurance report and Insurance Eligible/Offered report has relevance at the time it is run, which is why you will not have data until you have 2016 Employee ACA records. Though there is little use for an analysis report such as this for a time period which has already passed.

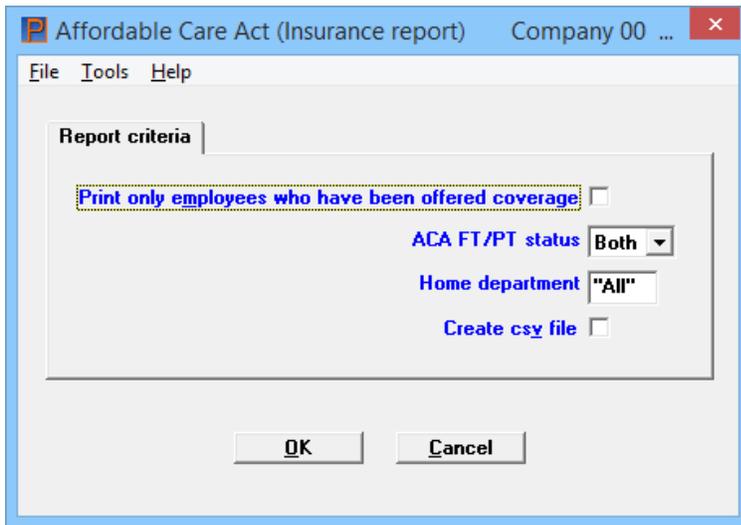
The Initial Measurement Period (IMP) and Standard Measurement Period (SMP) reports by definition are rigidly set in the parameters of the Groups. The IMP always begins at the first full month of any employee's tenure. For the SMP, you may select a Run date. This will default to the current date. However, you may choose to see who was full or part-time 15 months ago. The SMP may have more than one cycle going on at the same time, so it always lists 3 parts:

1. The Stability phase is the first section. For each Group, there is always 1 and only 1 Stability phase in progress.
2. The second section is the Administrative phase. This precedes the Stability and is set between 1 and 3 months in the Group. Most of the time there will not be an Administrative phase in progress, but when one IS in progress, that is when you look at the past data to determine who is part time (PT) and who is full time (FT).
3. The third section of the SMP is the Measurement phase. This is the first part of any cycle and depending on the Group settings, can last between 3 and 12 months. While this is in progress, the user still can view the projections and still has the opportunity to adjust schedules so that employees finish the Measurement on the desired side of the 130 hour/month threshold.

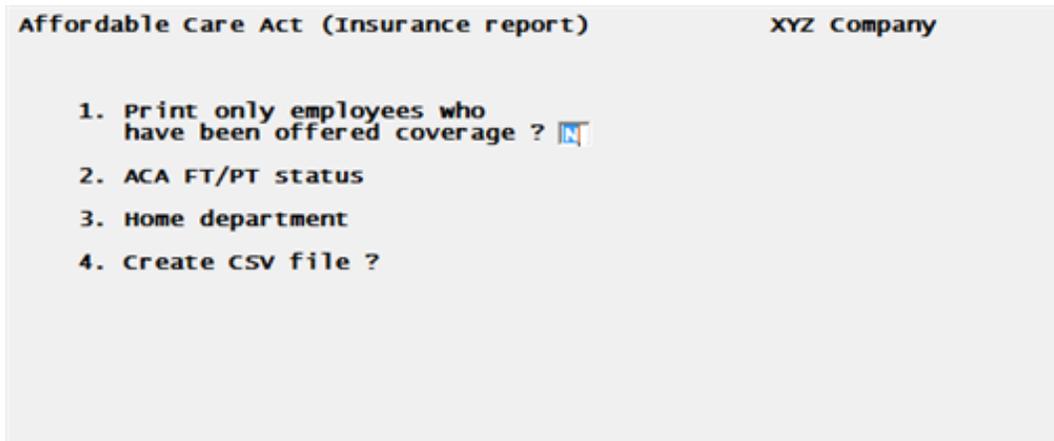
The SMP gives complete data for every active phase in progress. Meaning that even in the final month of a Stability Period most users are looking at data from a cycle that began over 2 years earlier. The IMP is relevant only once in any employee's tenure so there is nothing to discover by simulating a different date.

The Safe Harbor report does have value in being able to run it for a particular time. Ironically though, you may find that in practice, the W-2 Wages method is so superior as to make the Rate and Federal Poverty Level safe harbor methods virtually irrelevant.

Select *Insurance report* from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Print only employees who have been offered coverage

This field allows you to filter for only employees who have been offered coverage. The program reads the [Insurance offered](#) field in employee ACA information to determine which employees have been offered coverage.

ACA FT/PT status

Select FT = full time, PT = part time or Both for both full time and part time employees.

Home department

Enter the department or <F5> for "All" departments.

Create csv file

Check this box to generate a csv file output and print the report. Leaving the box unchecked will only print the report. Running the report on a Windows or Thin client system generates a CSV file automatically and launches your default system program which opens the CSV file. Using Linux/UNIX

telnet the program saves the CSV file to the ACACSV directory under the top-level PBS directory, however, the program does *not* automatically launch a system CSV program.

If you want to keep this data confidential, only allow users that can create this Payroll csv output to have access to the folder where you store the file.

The file is named similar to this:

00_ACA_Insurance_Report_20191104_15012505.CSV

In the example above, *00* is the company ID. *ACA_Insurance_Report* is the name of the report and *20191104_15012505* is the date and time it was created.

OK or Cancel

Select OK to display a list of printers or Cancel to return to the menu without printing.

If you checked the box for creating a csv file you will also be asked to select a location for the file. You may change the default file name to any name you like.

Generate offers of coverage

Generate Offers of Coverage is for non Graphical check/remittance users and non-payroll users from main menu item. If you are using the graphical check or direct deposit remittance the offer of coverage will print right on the employee's stub.

This program can:

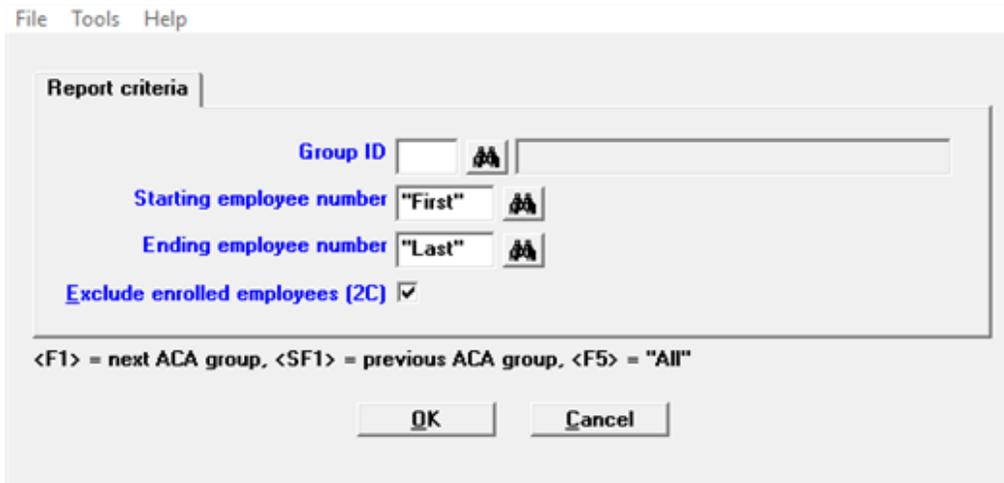
- Print a report of selected employees and includes an offer of coverage notice.
- Email to each employee an offer of coverage. Emailing depends on:

The email setup. To setup emailing for the PBS system and for each employee, see [Emailing Setup for Pay Advices and Offers of Coverage](#) in the Employees chapter.

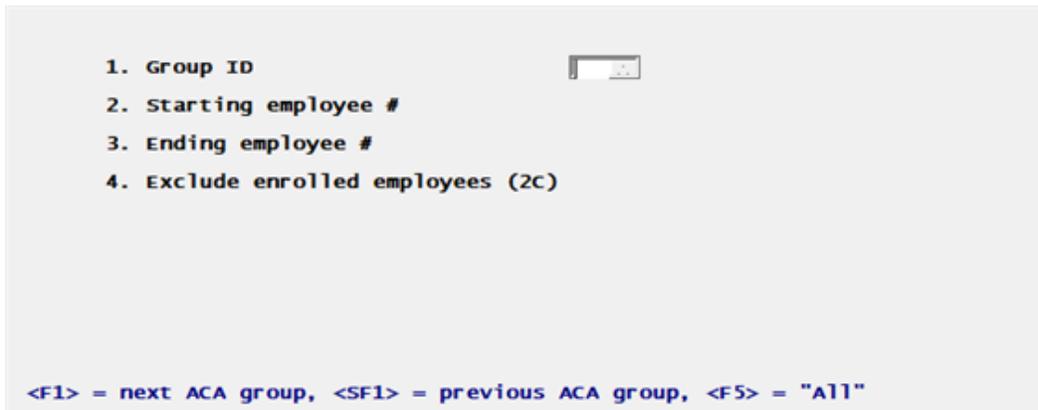
The setup of the *Enter employees ACA info* record. The [Insurance offered](#) field must be checked. Designates that for line 16 covered has not been offered for the current month. This designates that for line 16 covered has not been offered for the current month.

Select

Generate offers of coverage from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Enter the following fields:

Group ID

Enter the ACA group ID you want to use when generating the employee ACA records. If there is only one ACA group ID on file the program defaults to this. You may use one of the options:

<F1>	For the next ACA group
<SF1>	For the previous ACA group
<F5>	For "All" groups

Starting employee number

Enter the starting employee number.

You may use the option of <F2> for the "First" employee number or <F8> to find the employee via the lookup.

Ending employee number

Enter the ending employee number.

You may use the option of <F2> for the "Last" employee number or <F8> to find the employee via the lookup.

Exclude enrolled employees (2C)

Check this box to exclude any employees designated as having insurance coverage for the current month (Code 2C on Line 16 in *Enter employees ACA info*. Check this box to exclude any employees designated as having insurance coverage in *Enter employees ACA info*.

OK or Cancel

Select OK to display a list of printers or Cancel to return to the menu without printing.

If emailing is setup and there are employees in the selected group that are eligible to get an offer of coverage, the program will ask you to enter your email password. The employee will receive an email similar to below (the body text may be edited in PR Control information):

Subject: Offer of Coverage: 11/01/17

Dear (employee name)

You and any dependent(s) are eligible for Affordable Care Act health insurance. Please contact the HR department for more information or to enroll.

ALE Calculation Report

The ALE (applicable large employers) Calculation report generates monthly counts of full time, plus the calculation of part time employees to get full time equivalents, to help determine the ACA full time employee count.

You may already know that you have 50 or more full time employees and full time equivalent employees. When this is the case you may not need to run this report.

To get an accurate number of ACA defined full time employees, you must have ACA employee info records for each employee that worked throughout the year. The employee code must be set up accurately for each employee. See [Employee code](#).

The employee codes of owner and shareholder are considered exempt. These are totaled in the *Number of Exempt Employees* column.

Only the part time employees with a regular and family employee code are totaled in the *Total Hours of PT Employees working less than 130 hrs* column.

Hours for seasonal employees are totaled in the *Total Hours of Exempt Seasonal Employees* column.

The *Number of ACA Defined Full Time Employees* column is the addition of these three columns:

Number of All Assigned Full Time Employees

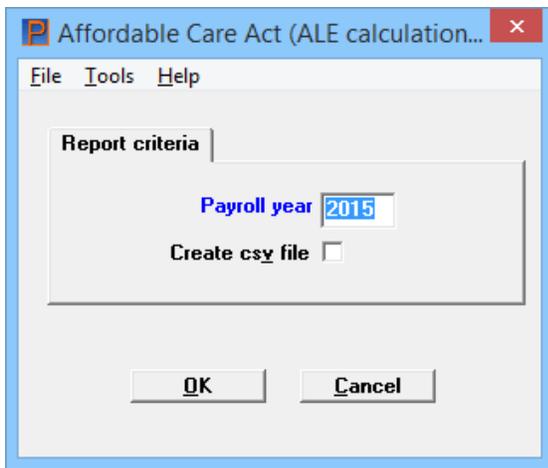
Number of PT Employees Working at least 130 hours

Number of FTEs from < 130 Hour PT Pool. This amount is rounded down

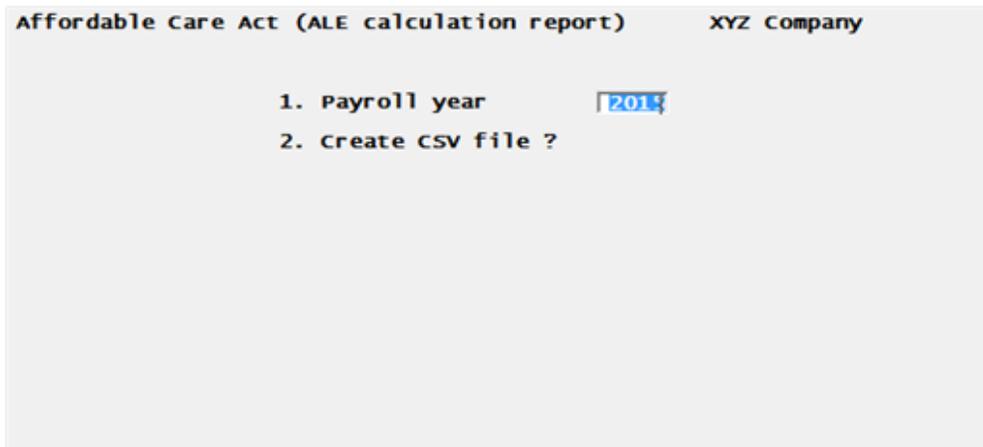
A monthly average is provided at the end of each column.

The [Monthly Labor Summary](#) report will also help you determine the number of full time and equivalent employees you have. Unlike the ALE calculation report, the Monthly labor summary report does not require you to enter employee ACA info first. Because of this the Monthly labor summary cannot take into account the employee codes or their exemptions.

Select *ALE calculation report* from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Enter the following fields:

Payroll year

Enter the payroll year. The year defaults to the system year.

Create csv file

Check this box to generate a csv file output and print the report. Leaving the box unchecked will only print the report. Running the report on a Windows or Thin client system generates a CSV file automatically and launches your default system program which opens the CSV file. Using Linux/UNIX telnet the program saves the CSV file to the ACACSV directory under the top-level PBS directory, however, the program does *not* automatically launch a system CSV program.

If you want to keep this data confidential, only allow users that can create the Payroll csv output to have access to the folder where you store the file.

The file is named similar to this:

00_ALE_Calculation_Report_2019_20191026_16331379.CSV

In the example above, *00* is the company ID. *ALE_Calculation_Report* is the name of the report, *2019* is the tax year and *20191026_16331379* is the date and time it was created.

OK or Cancel

Select OK to display a list of printers and print the report or Cancel to return to the menu without printing.

If you checked the box for creating a csv file, you will also be asked to select a location for the file. You may change the default file name to any name you like.

Eligibility and Insurance Offered Report

This list shows each employee's insurance eligibility and offer of insurance settings as entered via the *Enter employees ACA info* menu selection. You may select employees by their status of full time, part time or both.

This report defaults to printing data for the current *Control information* payroll year.

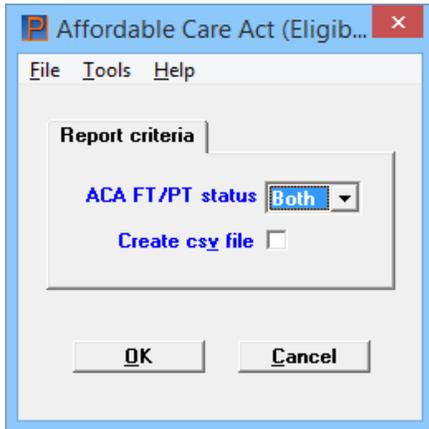
Employees will not print on the report if:

- they have a termination date
- they do not have an employee ACA information record for the current payroll year

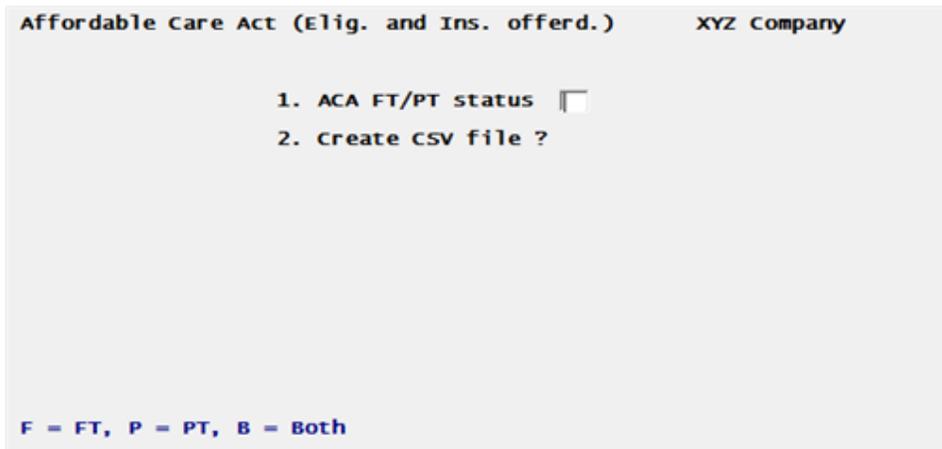
For those employees who are eligible for insurance, but have not been offered insurance, you will need to take the appropriate action.

Also see [Notes on When to Run the Insurance report and Insurance Eligible/Offered report.](#)

Select *Elig. and Ins. offerd. report* from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Enter the following fields:

ACA FT/PT status

Select FT = full time, PT = part time or Both for both full time and part time employees.

Create csv file

Check this box to generate a csv file output and print the report. Leaving the box unchecked will only print the report. Running the report on a Windows or Thin client system generates a CSV file automatically and launches your default system program which opens the CSV file. Using Linux/UNIX telnet the program saves the CSV file to the ACACSV directory under the top-level PBS directory, however, the program does *not* automatically launch a system CSV program.

If you want to keep this data confidential, only allow users that can create the Payroll csv output to have access to the folder where you store the file.

The file is named similar to this:

00_ACA_Eligible_Offers_Of_Insurance_Report_20191026_13404198.CSV

In the example above, 00 is the company ID. *ACA_Eligible_Offers_Of_Insurance_Report* is the name of the report and 20191026_13404198 is the date and time it was created.

OK or Cancel

Select OK to display a list of printers and print the report or Cancel to return to the menu without printing.

If you checked the box for creating a csv file you will also be asked to select a location for the file. You may change the default file name to any name you like.

Initial Measurement Period Report

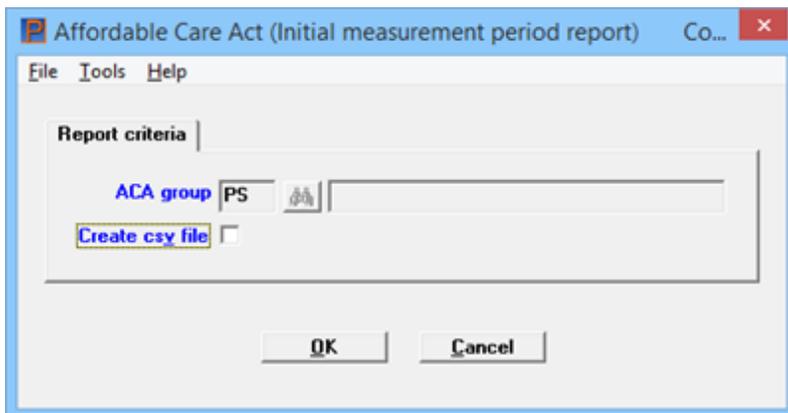
This report generates a list of employees for a particular ACA group and tells you the if the initial measurement period for the employee is in the *measurement period*, *administrative period* or *stability period*.

The initial measurement period is defined in the group record. See [Initial measurement period \(IMP\)](#).

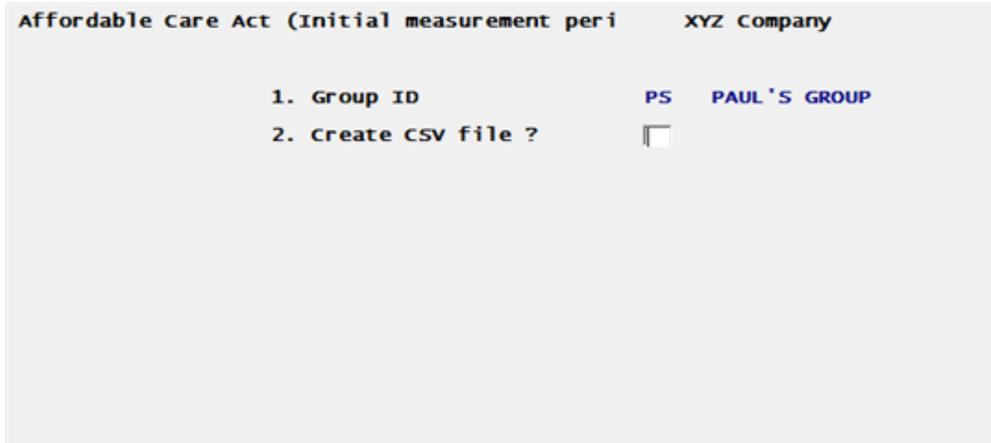
This report helps you determine the phase of the initial measurement cycle for an employee. Based on the average number of hours an employee has worked so far, it helps determine if they are actually full time or part time. The last column indicates the employee's measured ACA full time / part time status which helps you decide on what to enter for the employee's ACA info. See [ACA FT/PT status](#).

Employees

Select *Init. measurement prd. report* from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Enter the following fields:

ACA Group

Select an ACA group code as entered in the *Enter ACA groups menu* section. If there is only one entered group, this field defaults to this group.

If an ACA group description has been entered for the group, it displays to the right of the code.

If you have only one group it automatically fills in.

You have the following options:

<F1>	For the next ACA group file
<SF1>	For the previous ACA group

Create csv file

Check this box to generate a csv file output and print the report. Leaving the box unchecked will only print the report. Running the report on a Windows or Thin client system generates a CSV file automatically and launches your default system program which opens the CSV file. Using Linux/UNIX telnet the program saves the CSV file to the ACACSV directory under the top-level PBS directory, however, the program does *not* automatically launch a system CSV program.

If you want to keep this data confidential, only allow users that can create the Payroll csv output to have access to the folder where you store the file.

The file is named similar to this:

00_Initial_Measurement_Period_Report_12_20191026_13334094.CSV

In the example above, *00* is the company ID. *Initial_Measurement_Period_Report* is the name of the report, *_12_* is the ACA group ID, and *20191026_13334094* is the date and time it was created.

OK or Cancel

Select OK to display a list of printers and print the report or Cancel to return to the menu without printing.

If you checked the box for creating a csv file you will also be asked to select a location for the file. You may change the default file name to any name you like.

Standard Measurement Period Report

This report generates a list of employees based on the standard measurement period settings of a particular ACA group. The measurement period are defined in the group record. See [Standard measurement period \(SMP\)](#).

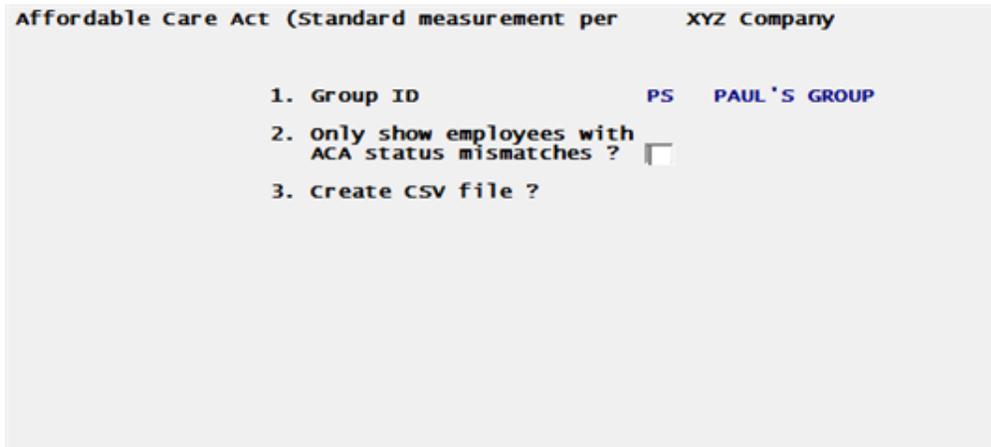
The average monthly hours is compared to the corresponding monthly ACA status matching the report Run date. Based on the average number of hours an employee worked during the standard measurement period, this report determines whether the employee is full time or part time. Based on the ACA status consistency column, you can set the employee ACA full time /part time status properly. See [ACA FT/PT status](#).

In the *Reports and Form Examples* appendix, see a sample [Standard Measurement Period Report](#).

Select *Std. measurement prd. report* from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Enter the following fields:

ACA Group

Select an ACA group code as entered in the *Enter ACA groups* menu section. If an ACA group description has been entered for the group, it displays to the right of the code.

If there is only one entered group, the field defaults to this group.

You have the following options:

<F1>	For the next ACA group file
<SF1>	For the previous ACA group

Only show employees with ACA Status mismatches

Check this box to help identify those employees with an incorrect full time/part time status designation. Otherwise, leave it unchecked.

Create csv file

Check this box to generate a csv file output and print the report. Leaving the box unchecked will only print the report. Running the report on a Windows or Thin client system generates a CSV file automatically and launches your default system program which opens the CSV file. Using Linux/UNIX telnet the program saves the CSV file to the ACACSV directory under the top-level PBS directory, however, the program does *not* automatically launch a system CSV program.

If you want to keep this data confidential, only allow users that can create the Payroll csv output to have access to the folder where you store the file.

The file is named similar to this:

00_Standard_Measurement_Period_Report_A_20191022_15274633 .csv

In the example above, *00* is the company ID. *Standard_Measurement_Period_Report* is the name of the report, *_A* is ACA group and *20201020_15274633* is the date and time it was created.

OK or Cancel

Select *OK* to display a list of printers and print the report or *Cancel* to return to the menu without printing.

If you checked the box for creating a csv file, you will also be asked to select a location for the file. You may change the default file name to any name you like.

Safe Harbor Comparison Report

There are three Safe harbor methods which include W-2 wages, Rate of pay and Federal poverty level. The Safe Harbor comparison report helps you determine the Safe harbor method you assign to your employees. A column for each method is provided on the report.

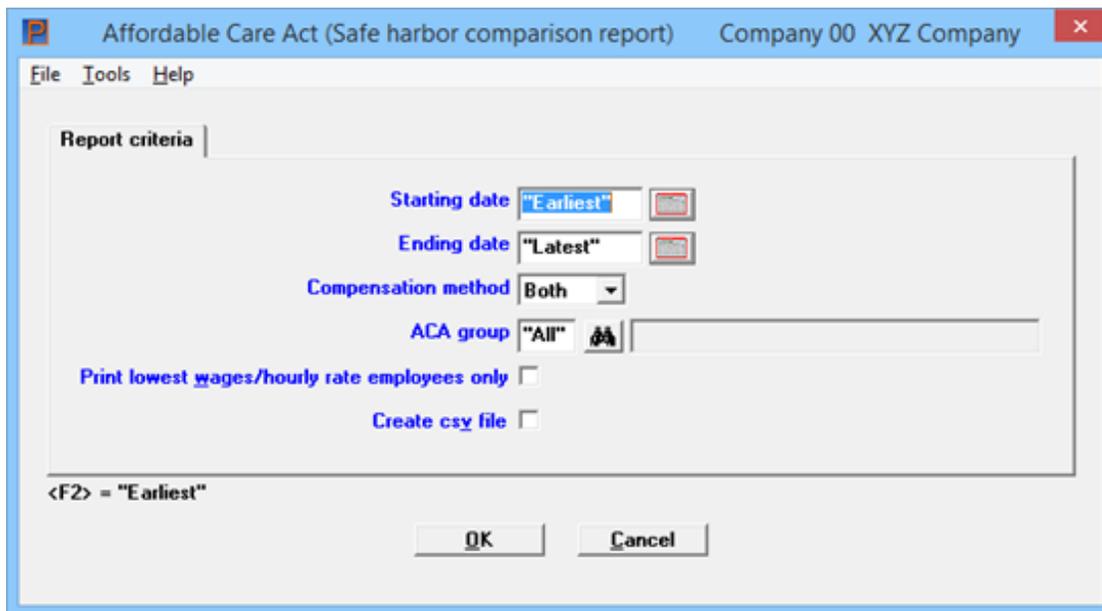
There is a column for year-to-date wages. This is computed by accumulating the time history *total Federal withholding gross pay* field for each period falling within the year.

The Safe harbor method is determined by an entry in the ACA group. The ACA group gets assigned to the employee ACA information. See the instructions for the [Safe Harbor method used](#) field.

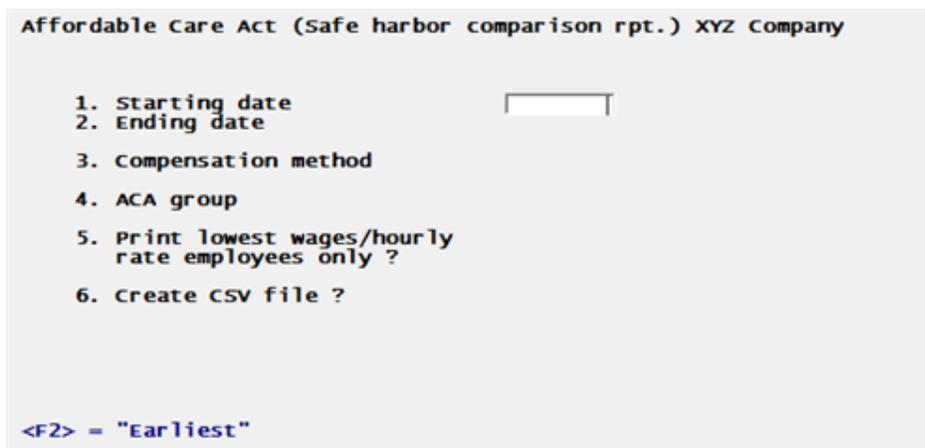
In order for employees to print on this report they must fit the following criteria:

- No termination date
- They must have an employee ACA record
- The employee must be insurance eligible per the employee ACA record
- They must have hours worked within the date range

Select *Safe harbor comparison report* from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Enter the following fields:

Starting date *and* Ending date

This field filters on the period ending date from Time history (TIMHIS) and Adjustment history (MANHIS).

If the employee is paid weekly or bi-weekly a pay period can overlap two months. In this case the report only uses that part of the pay period in the date range entered.

To be most effective, you should enter a date range that contains the current fiscal year data and starting at the first of the month and ending on the last day of a month.

Compensation method

Enter Salary, Hourly or Both.

Using character mode enter S = Salary, H = Hourly or B = for both salary and hourly.

ACA group

Enter the ACA group or select the Lookup via <F8> to display a list of ACA groups and select a group from there.

If only one ACA group has been entered using *Enter ACA groups*, the program defaults to this group and cannot be changed.

You have the following options:

<F1>	For the next ACA group file
<SF1>	For the previous ACA group
<F5>	For "All" groups

Print lowest wages/hourly rate employees only

Checking this box will print the employee with the lowest hourly rate and the employee with the lowest average monthly wage. This could be the same employee. No matter how many months an employee works, it is calculated over a 12 month period.

Determining the lowest hourly rate and lowest average monthly wage employee helps you decide the Safe Harbor method you will assign to the ACA group, which gets assigned to your employee's ACA information.

Create csv file

Check this box to generate a csv file output and print the report. Leaving the box unchecked will only print the report. Running the report on a Windows or Thin client system generates a CSV file automatically and launches your default system program which opens the CSV file. Using Linux/UNIX telnet the program saves the CSV file to the ACACSV directory under the top-level PBS directory, however, the program does *not* automatically launch a system CSV program.

If you want to keep this data confidential, only allow users that can create the Payroll csv output to have access to the folder where you store this file.

It is named similar to this:

00_ACA_Safe_Harbor_Comparison_Report_PA_20191026_12035149.CSV

In the example above, 00 is the company ID. *ACA_Safe_Harbor_Comparison_Report* is the name of the report, *_PA_* is the ACA group ID, and *20191026_12035149* is the date and time it was created.

If you select "All" for the ACA group, that part of the file name is written as zz. Otherwise, it will print the actual ACA group ID.

OK or Cancel

Select *OK* to display a list of printers and print the report or *Cancel* to return to the menu without printing.

If you checked the box for creating a csv file, you will also be asked to select a location for the file. You may change the default file name to any name you like.

VALIDATE 1095-C/1094-C INFORMATION

Use this selection to print 1095-C/1094-C copies to check the validity of the Affordable Care Act data.

This function will allow you to print draft copies of the 1095-C forms. You may use this copy to validate the employee's data. You are encouraged to include a printed 1095-C form, along with a short explanation of the form to each employee and have them check their data, such as address and months worked. Have each employee return their form with corrections or an "ok" indication.

If there are any errors in the data a 1095-C Exception Report will be printed. When there are errors, the 1095-C forms will not print. You must first correct the data and run the report again. Here are some of the possible errors and how to correct the errors:

- *Full-Time employee with no wages.* If the employee did not receive any pay during the year, set the employee ACA record ACA FT/PT status fields to blank. Otherwise, enter Time worked and print checks for the employee for the year.
- *Missing social security number.* Using the *Employees* menu selection, enter the social security number in the employee record.
- *Invalid social security number.* Using the *Employees* menu selection, correct the social security number in the employee record.

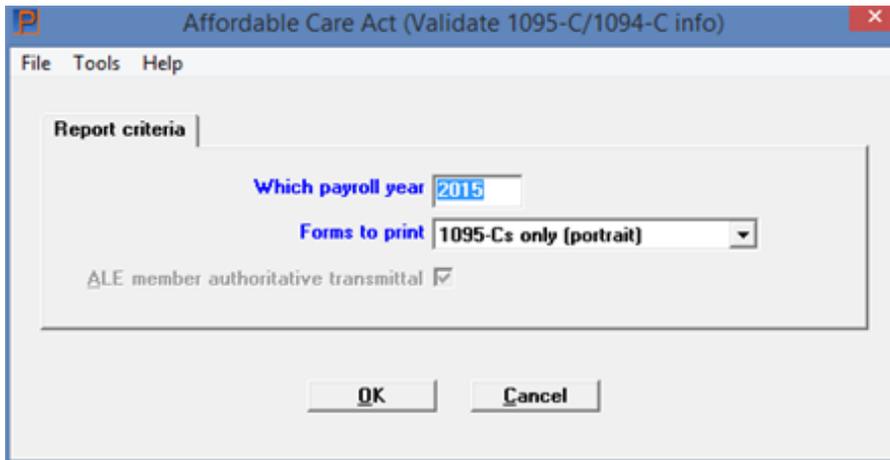
Windows Printer

When selecting *Windows printer*, the program combines the data with jpg files that contain images of the 1095-C and 1094-C forms. In the middle of each page the image will contain the letters **Draft Only**. Do not use pre-printed forms with *Windows printer*.

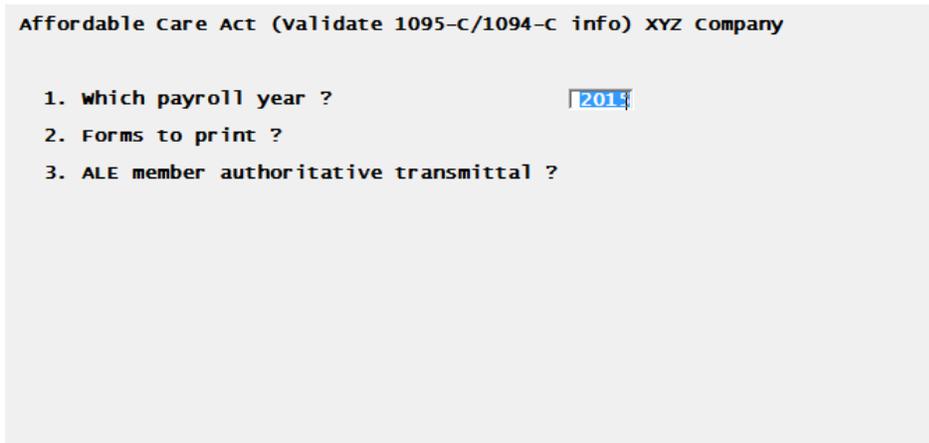
Company information Printer

When using a *Company information* printer, the program prints the following with the data: DRAFT ONLY- DO NOT SUBMIT TO THE IRS. With a Company information printer, you must use pre-printed forms. You may purchase 1095-C and 1094-C forms from [Trainor Business Forms](#) – 847-296-2900.

Select *Print 1095-C/1094-C forms* from the *Affordable Care Act* menu. The following screen displays:



Character Mode



Which payroll year

Enter the payroll year of the data to be reported.

Forms to print

You may select to print a 1094-C form and 1095-C forms as well as the 1095-C exception report. The 1095-C is available in landscape and portrait page orientation. The 1094-C is only available in landscape.

If there is any problem with the data, the exception report will print. See [Fatal Errors and Warnings](#). Print the exception report, fix data problems as needed and then print the forms.

You must use a *Company information* laser printer. You have these options:

Character mode	Graphical mode	Description of forms printed
L	1095-Cs (landscape) & 1094-C	Prints the 1095-C landscape and the 1094-C
P	1095-Cs (portrait) & 1094-C	Prints the 1095-C portrait and the 1094-C
4	1094-C only	Prints the 1094-C only
5	1095-Cs only (landscape)	Prints the 1095-C landscape only
6	1095-Cs only (portrait)	Prints the 1095-C portrait only
E	1095-Cs exceptions only	Only prints the exception report *

* When the exception report prints you must correct the data before you can print the forms.

ALE member authoritative transmittal

This field cannot be entered.

OK or Cancel

Click on OK to select a printer for printing the forms or Cancel to not print and return to the menu.

When draft printing 1094-C/1095-C information to a *Windows printer* and you plan on distributing the forms to employees, be sure to select single sided printing only.

Fatal Errors and Warnings

If there are fatal errors no forms will print and only an exception report will print. In order to print forms you must correct the errors listed in the exception report.

There may also be warnings. You are not required to correct warnings, however, it is recommended that you look at the warnings before you print the forms. There may be some data you want to correct.

Here are some of the possible 1095-C errors and how to correct the errors:

- *"Missing employee record"* If there is an employee ACA record but the employee record is missing you will get this message. You must add the employee record.
- *Full-Time employee with no wages.* If the employee did not receive any pay during the year, set the employee ACA record ACA FT/PT status fields to blank. Otherwise, enter Time worked and print checks for the employee or enter Adjustments for the employee and post for the year.
- *Missing social security number.* Using the *Employees* menu selection, enter the social security number in the employee record. A missing social security number is only a warning if the employee has no employee ACA record. If there is an employee ACA record then it is a fatal error.
- *Invalid social security number.* Using the *Employees* menu selection, correct the social security number in the employee record.
- *Missing hired date.* Using the *Employees* menu selection, enter a hire in the employee record.

- *Wrong employee type.* This would only happen if the employee type has been changed to Non-employee.
- *Missing Plan start month.* Enter the plan start month in the employee ACA record.
- *Full-Time employee with no wages.* Alter the employee ACA record to match the employees work information. In this case make the employee Part time.
- *"Wrong code for Full-Time employee".* You have entered either "OWN"er, "SHA"reholder OR "SEA"sonal on the employee ACA record and the employee is also entered as full time. Change the type to something acceptable.

Here are some 1094-C errors:

- *ACA Employer ID does not match Tax report ID #.* Enter a tax report ID that matches the Federal tax table and the ACA Control information record.
- *E-filing is required. Get appropriate license.* You have 250 or more employees and you require a different license.

REPORT 1095-C/1094-C INFORMATION

Use this selection to do the final processing for Affordable Care Act reporting to the IRS and print forms for your employees.

This menu selection prints or generates the final version that you provide to the IRS. If you are validating the accuracy of your data, use the *Validate 1095-C/1094-C info* menu selection.

This selection can be run after the calendar year is completed, in the new payroll year:

- For final reporting.
- To test the E-file with the IRS.

At any time during the year, you may also use this selection to get a 1095-C full time employee count.

The functions that you are able to use here depend on your ACA license type:

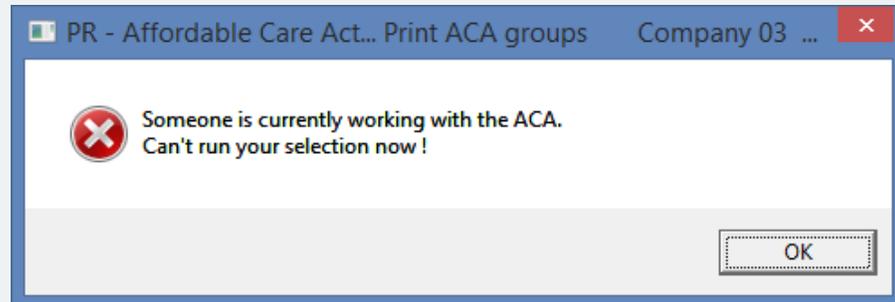
- For ACA Essentials license users, the *Report 1095-C/1094-C info* menu selection allows you to **print** data on pre-printed 1095-C *Employer-Provided Health Insurance Offer and Coverage* forms and pre-printed 1094-C *Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns* forms.

The 1095-C, 1094-C and other forms are available through [Trainor Business Forms](#): 847-296-2900. Landscape 1095-C forms, required for IRS submission, allow more room than portrait forms for printing the Name of ALE Member field - legal company name. You do not have to order Transmittal Form Page 3 (1094-C). This is only for companies with common ownership. Health Coverage Continuation form are only required for employees with more than 6 covered individuals. Portrait forms are useful for sending copies to your employees. They are easily folded and mailable.

- If you have an ACA Corporate or ACA Enterprise license, the program will generate a magnetic E-file. It will also print 1095-C forms for your employees. The 1095-C forms are available through Trainor Business Forms: 847-296-2900.

Someone is currently working with the ACA.

Can't run your selection now !



Note

This program may need to access ACA data from multiple companies, so modifying ACA data in any company is prohibited. You may get the above message for either of these two conditions:

1. Accessing this menu selection locks any other user out of the other Affordable Care Act menu selections, even in other companies.
2. If you attempt to access this menu selection if any other user is accessing any ACA menu selection for any company, you will see the above message.

Many programs remain locked and do not allow entry when you leave this program is open. Exit to the menu when you are done.

1095-C/1094-C Forms

Essentials Licensees must use a *Company information* laser printer and pre-printed forms for the 1095-C. The 1095-C form is available to print in the page orientations of landscape and portrait. However, landscape allows the printing of up to 50 characters for the full legal ALE company name and portrait only allows 25 characters. Printing your full legal name is recommended. For that reason Landscape orientation is recommended. See [Name of ALE Member \(Employer\)](#) in *Control information*. The Landscape orientation of the 1095-C is required for submission to the IRS.

The company address used for printing the forms is from the *Control information Affordable Care Act (ALE)* tab. If you are a Designated Government Entity company, address and other information is used from the *Affordable Care Act (DGE)* tab.

Users with essentials Licensees will not need to order Transmittal Form Page 3 (1094-C). This is only for companies with common ownership.

Health Coverage Continuation forms are only required for self-insured companies and for employees with more than 6 covered dependents.

1095-C forms will *not* be printed for employees that:

- do not have an employee ACA record.
- have a ACA record but do not have at least one month designated as full time (FT).
- do not have a social security number or a social security number of 000-00-0000.

1095-C/1094-C Magnetic Media E-File

Most of the data generated to the E-file is from employee ACA info. However, the company address is from the *Control information Affordable Care Act (ALE)* tab. If you are a Designated Government Entity company, address and other information is used from the *Affordable Care Act (DGE)* tab. See the [Affordable Care Act Tab / Screen](#) and the other Affordable Care Act tabs.

1095-C records will *not* be generated for employees that:

- do not have an employee ACA record.
- have a ACA record but do not have at least one month designated as full time (FT).
- do not have a social security number or a social security number of 000-00-0000.

Back up your PBS System

Back up your data before you run this selection. Once the forms are printed for a particular year, you will not be able to print them again or create an E-file again. If your forms jam or do not print properly for any reason you must go to a backup to reprint. Be sure to do a complete backup of the PBS system. As regulations change from year-to-year, PBS programs will also change accordingly. Including everything in the PBS folder in your backup is recommended. If using SQL, backup your SQL database companies as well.

You have an option during the printing and E-file generation process to not finalize the ACA data, when you answer No to the question *Did the 1095-C forms just printed OK?*. If you answer no, you will be allowed to print the forms or generate the E-file again.

Select *Report 1095-C/1094-C info* from the *Affordable Care Act* menu. The following screen displays:

Affordable Care Act (Report 1095-C/1094-C info)

File Tools Help

Report criteria

Get 1095-C total count

Which payroll year 2016

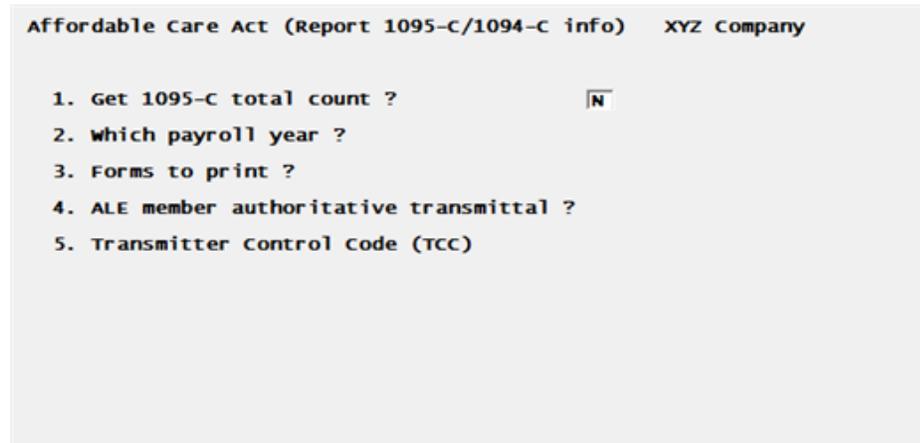
Forms to print Finalize 1095-Cs & 1094-C reporting

ALE member authoritative transmittal

Transmitter Control Code (TCC)

OK Cancel

Character Mode



Enter the following fields:

Get 1095-C total count

You may select this field for calculating the number of 1095-C forms to order.

When this field is checked:

- The program displays a window which provides the total number of 1095-C full time employees.
- The 1095-C forms are not printed and nothing else is printed.

The full time employee count can only be done for the current open ACA year.

If you do not check this field, be prepared to mount your 1095-C and 1094-C forms on the printer.

Which payroll year

Enter the payroll year of the data to be reported on the forms.

Forms to print

You may select to process a 1094-C and 1095-Cs as well as the 1095-C exception report.

If there is any problem with the data, the exception report will print for each of the choices below . It is recommend that you print the exception report first, fix data problems if they exist and then print the forms.

To print the forms, you must use a *Company information* laser printer. You have these options:

Character	Graphical	Description
G	Generate submission test file	<p>This option is only available if you have a Corporate or Enterprise license. In order to test the E-file with the IRS, select this option. There are two alternatives for a test file submission:</p> <ul style="list-style-type: none"> • Submit yourself: The application and validation of the E-file has many steps and can be a multiple week process with the IRS. For a list of the steps, go to Procedures for 1095-C and 1094-C Electronic Filing. • Have Passport submit a file for you. To reduce the submission time, Passport offers a Proxy Submission Service. Per this service, Passport will file to the IRS on your behalf. Contact your PBS provider for fees and instructions.
F	Finalize 1095-Cs & 1094-C reporting	<p>Depending on your license this will happen:</p> <ul style="list-style-type: none"> • With the Corporate or Enterprise license one set of 1095-C forms are printed for each employee and the E-file is generated. • With an Essentials license, only forms are printed. You MUST have plenty of copies of each form ready. The program prints two sets of the 1095-C main form and 1095-C continuation sheet; one for each employee and a separate set for the IRS. It also prints the 1094-C page 1 and page 2 forms. ALL the above forms are printed in one run!
E	1095-Cs exceptions only	<p>Only prints the exception report. If there are no exceptions a message displays "No exceptions found in this range". If exceptions are found the exception report prints. You must correct the data before you can print the forms or generate the E-file.</p>

ALE member authoritative transmittal

This field cannot be entered.

Transmitter Control Code (TCC)

You must enter this field if you have an ACA Corporate or Enterprise license. If you have an Enterprise license you do not have to enter this field.

If you have a Corporate or Enterprise license which generates an Electronic file, enter the TCC that was assigned to you by IRS. If you do not have a TCC, see [Procedures for 1095-C and 1094-C Electronic Filing](#).

OK or Cancel

Select Cancel and the program closes and your are returned to the menu.

Select OK and one of these will happen:

- If you selected to *Get 1095-C total count* a window displays with the total count.
- If you selected *1095-Cs exemptions only* the printer window displays if there are exceptions. If not exceptions a message display indicating this.
- If you selected to *Finalize 1095-Cs & 1094-C reporting* the following screen displays next:



Enter the confirmation fields.

Print employee 1095-C copies landscape

You can print 1095-C forms either in portrait or landscape. Check the box to print landscape. Leave it unchecked to print portrait. This defaults as unchecked.

Mask social security numbers

To mask the social security numbers check this box. Otherwise leave it unchecked to print the social security numbers on the 1095-C forms. This defaults and checked. Employee copies of the 1095-C will have masked Social Security Numbers. The default choice will mirror the Use encryption mask selection in *Payroll Control information*.

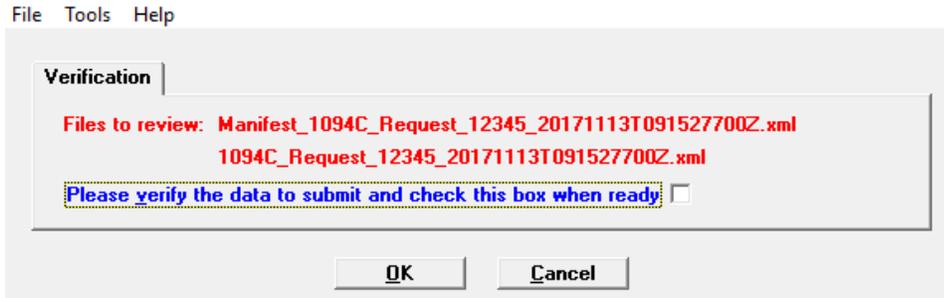
OK or Cancel

Select *Cancel* to return to the menu without printing.

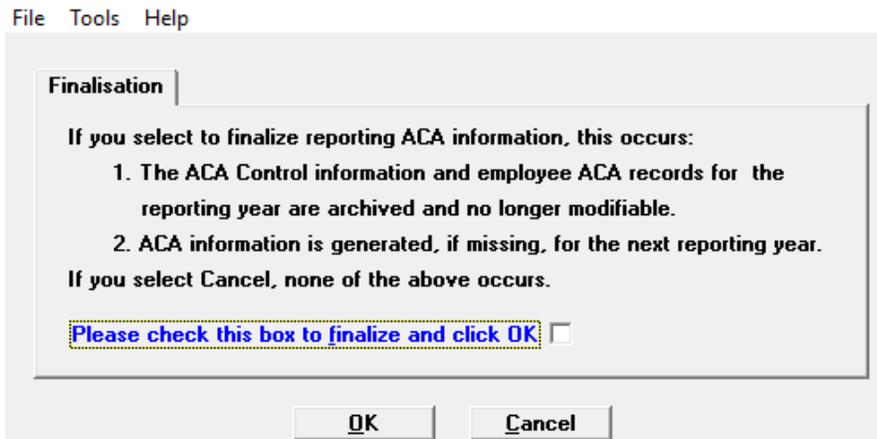
The sequence of the screens and prompts depend on the type of license you have. If you have an Essentials license go to [Essentials License Screens and Prompts](#). If you have an Enterprise or Corporate license proceed here:

Enterprise and Corporate License Screens and Prompts

The program prompts for printing the employee copies of the 1095-C form and the 1095-C continuation forms. When that completes this window displays:



Verify that the printing is correct and then proceed. The following screen displays:



IMPORTANT: When you check the box and select *OK* the current year's data is finalized and cannot be changed. Before you do this, be certain that your forms and electronic files are okay and that none of the data needs to be changed again for this year.

If you do not check the box and select *Cancel* you may still change your data and the forms can be printed again for the current year.

Essentials License Screens and Prompts

Select *OK* to start the process of printing the 1095-C and 1094-C forms. Be prepared to mount the forms on the printer for each type. The forms will be printed in this order:

Employee's copy

1095-C forms

1095-C Continuation Sheets

Copies for the IRS

1095-C forms

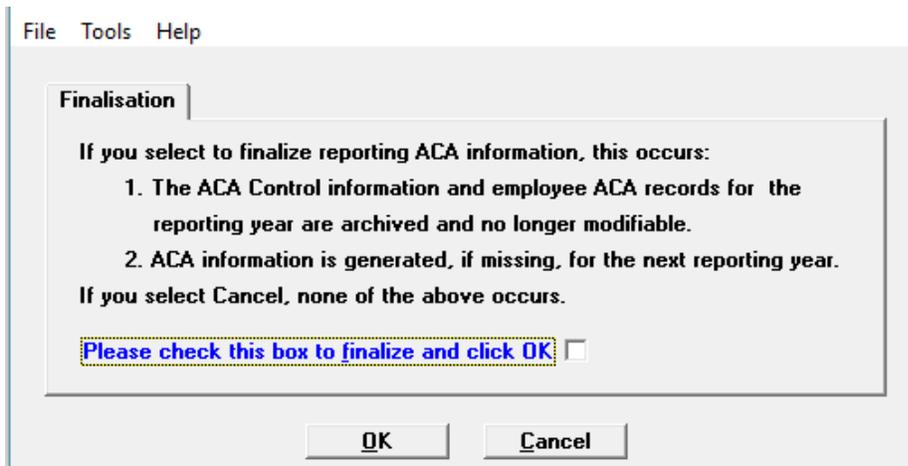
1095-C Continuation Sheets

1094-C forms

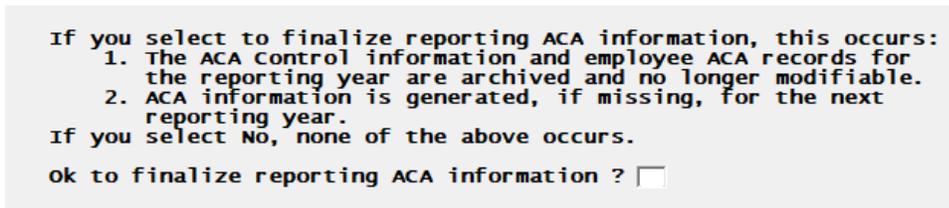
1094-C Page 1

1094-C Page 2

When the process of printing is done the finalization screen displays.



Character Mode



IMPORTANT: When you check the box and select OK the current year's data is finalized and cannot be changed. Before you do this, be certain that your forms are okay, none of the data needs to be changed and printed again for this year.

If you do not check the box and select Cancel you may still change your data and the forms can be printed again for the current year.

1095-C Printing Errors

If you load the wrong forms or have a printer error, you now have the ability to print a single form

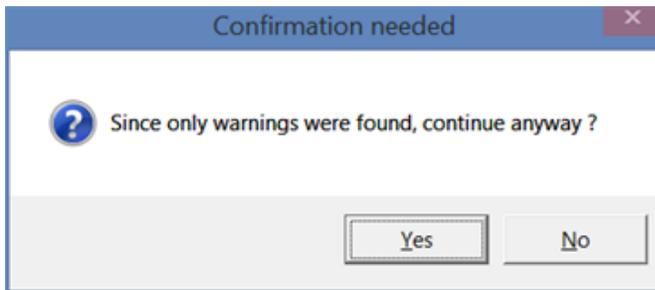
When you are prompted with the *Are ____ forms just printed OK?* window, click No. You will be able to enter the last correctly printed SSN and choose whether you want to print just one single form or the remainder of the run for that company and form type. You may also select <F5> to reprint the entire company and form run.

Errors and Warnings



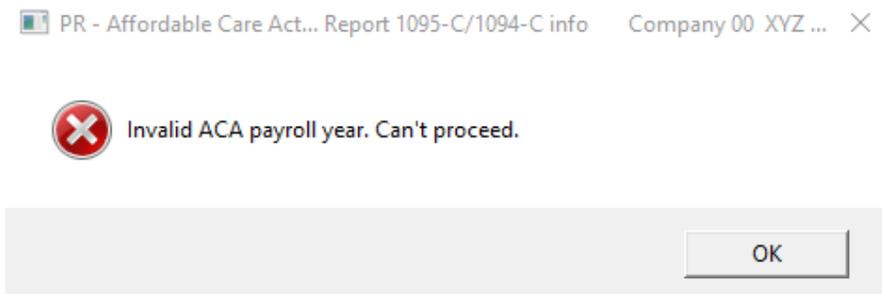
In the example above there are both errors and warnings. You may only have errors and no warnings. Regardless, if there are fatal errors the forms will not print or the electronic file will not be generated. Print the errors and warnings report. The errors must be corrected. Correcting the warnings is optional. See [Fatal Errors and Warnings](#).

Warnings Only Message



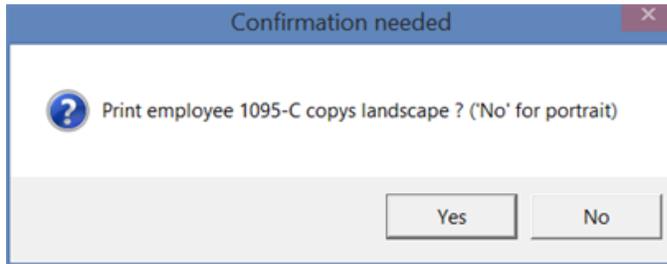
If you get the warnings were found message you may choose to ignore the warnings and continue. To continue select Yes. If you prefer to review the warnings before you continue select No.

Invalid ACA Payroll Year



The *Invalid ACA payroll year* message occurs when the current system date is in the same year as your ACA data year. Wait until after January 1 to report your 1095-C / 1094-C data.

Form Selection Type

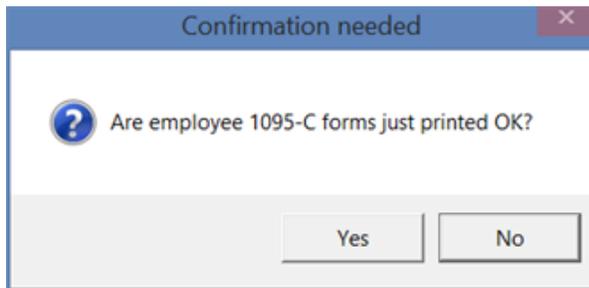


Select Yes to print 1095-Cs in landscape orientation. Select No to print in portrait orientation.

Select a *Company information* laser printer. Verify that the forms are mounted on the printer.

Print an alignment if needed.

Print Confirmation



If you select Yes, the ACA records are locked and cannot be reprinted (unless you go to a backup. If you select No, you may reprint the forms again.

If you are printing 1095-C forms only, note the total number of employees. Later, when you print the 1094-C form, verify that the same number of employees is being accounted for on the form.

From the totals screen, select OK or Cancel to return to the menu.

Generated ACA E-files

XML files are generated for E-filing. There is a manifest file and standard file. Both are needed for E-filing.

In the file names, the user's 5 character Transmitter Control Code appears the word "Request", followed by a timestamp. Here are examples:

1094C_Request_BB3WT_20160129T161327990Z.xml

Manifest_1094C_Request_BB3WT_2060129T161327990Z.xml

Both files start with the Passport Company ID and the reporting year. The remainder of the file name is what is recommended by the IRS.

PROCEDURES FOR 1095-C AND 1094-C ELECTRONIC FILING

Here are the steps:

1. If you have not already done so, to verify that your ACA data is correctly printed and thoroughly review your draft copies using the *Validate 1095-C/1094-C info* menu option.
2. The IRS documents the application procedures in <https://www.irs.gov/e-file-providers/air/affordable-care-act-information-return-air-program>. The entire process should take between 3 and 4 weeks.
3. All responsible Officials and Contacts (at least 2 of each) must register with [IRS e-Services](#).
4. Submit the ACA Information Return Application to the IRS for Transmitter Control Code (TCC) with your Role as an **Issuer** if you are a Corporate licensee (single EIN) or both an **Issuer** and **Transmitter** if you are an Enterprise licensee. Select ISS-UI, not A2A.
5. Once you have a TCC, go to your licensed company in PBS>>P/R>>Affordable Care Act>>Report 1095-C/1094-C info. Under *Forms to print*, select *Generate submission test files* and enter your TCC. The Transmitter Control Code (TCC) field is protected. If you enter it correctly, just continue. If you entered an incorrect TCC and you need to correct it, go back to the field and use the <F2> key to Allow a protected change.
The software will generate two XML files in your top level folder; **Manifest_1094C_Request...** and **1094C_Request_...** You may leave them in the top level folder or move them to a more convenient and more secure location on your Desktop or elsewhere.
6. Log in to the [IRS.gov submission page](#).
7. On the right side you will see a box with a UI Channel Link header. Underneath the header are links to both the **AATS Testing** and **Production** environments. Select **Testing**.
8. Log in and upload your Manifest and Request test files.
9. Record the **ReceiptID**, which allows you to check on the approval status. Approval can take as little as 10 minutes, but during the filing season can be 48 hours or more.
10. When the automated check says “Accepted”, you must call the IRS help line at 866-937-4130 to have them manually update your status from Testing to Production. If you look at your online TCC Application and it has been successfully updated, you will notice the designation has changed from “**T**” to “**P**”.
11. Once you have received IRS approval, you are ready to submit your own files.
12. To set up a restore point, we highly recommend backing up your files before final printing.
13. Log in to your ACA licensed PBS company and go to P/R -> Affordable Care Act -> Report 1095-C/1094-C info. For field by field instructions see [Report 1095-C/1094-C Information](#).
14. Under the *Forms to print* field, select *Finalize 1095-Cs & 1094-C reporting*. If you need to correct the TCC, you must go to that field and use the <F2> key.
15. The *Report 1095-C/1094-C info* menu selection will print employee copies on forms and then generate two XML files in your top level PBS folder. They will be named similarly to the test versions above, (example: **Manifest_1094C_Request...**, and **1094C_Request...**). They will be easier to find if

you sort the files by date modified. You may leave them in the top level folder or move them to a more convenient location on your Desktop or elsewhere.

16. Again, to guard against incorrect direct links, start at [this IRS website page](#).
17. Navigate back to the UI Channel Link header on the right side. This time select the **Production** environment.
18. After logging in, choose <Submit Selected Organization>, <Submit Selected Version> (Right now there is only one choice), and <Upload ACA forms> to upload the Manifest and Request files.
19. Write down your **ReceiptID**. You will need this number to check the status or make corrections if they are required later.

Closing an Affordable Care Act Year

You may create a new year for the Affordable Care Act using two methods:

- Close the Payroll year. This will update the Affordable Care Act control by adding a new record and generate employee ACA records.
- You can do this manually before you close the Payroll year.

Go to PR >> Master Information >> Control Information >> Affordable Care Act >> Edit. Change to the new year. Most information will default, but you can edit any other fields you like. "Save" and you're ready to generate or enter new year employee records. We recommend only adding records for new employees and allowing the software to generate the new year records for ongoing employees as normal, with the close of the previous ACA year.

ACA FILE AND INITIALIZATION UTILITIES

There are multiple Payroll files/tables used in the reporting of Affordable Care Act reports and forms. However, there are four files that are used to store only Affordable Care Act data. These include:

Name	Description	Menu selection access
ACACTL	ACA control information	Master information -> Control information
ACAGRP	ACA groups	Affordable Care Act -> Enter ACA groups
EACACV	ACA covered individuals	Affordable Care Act -> Enter employees ACA info
EMPACA	Employee ACA information	Affordable Care Act -> Enter employees ACA info

There is a separate set of utilities for the ACA files. In the top level PBS run ACAUTIL.BAT. In Linux, run acautil.

If you have multiple companies, while on the company ID field, you have the option to enter <F5> for all companies.

These files are not exported or restored using the extended file utilities.

There is also a separate set of initialization utilities for the ACA files. In the top level PBS, run ACAINIT.BAT. In Linux, run acainit.

EZ Convert will convert the exported ACA data to version 12.07 and beyond.