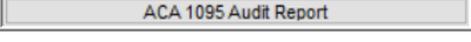
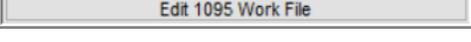
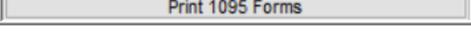
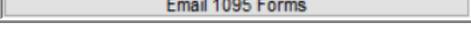
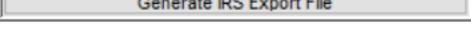
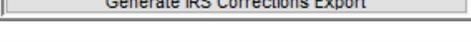
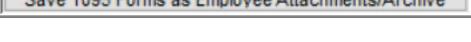




1095 Processing Steps Menu

ADMINS uses a **1095 Processing Step Menu** to complete all requirements for ACA filing for Applicable Large Employers (ALE). The menu is accessed from the 1095 Batch Selection screen. This document describes how to create 1095 batches and how to use the steps on the menu..

1	1095 Batch Selection Screen.....	2
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4	 ACA Filing Table	5
5	 Bargaining Unit Table – ACA TAB.....	5
6	 ACA Audit Reports	6
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1 1095 Batch Selection Screen

The 1095 Batch Selection screen is the entry point for all 1095 processing.

Human Resources ▶ Year End Processing ▶ 1095 Processing

This screen allows 1095C batches to be accessed by multiple users. This will allow user “Anthea” to create a batch and another user “Theresa” to complete the batch. There are four batches listed below in **Figure 1**. The screen components are described in the table.

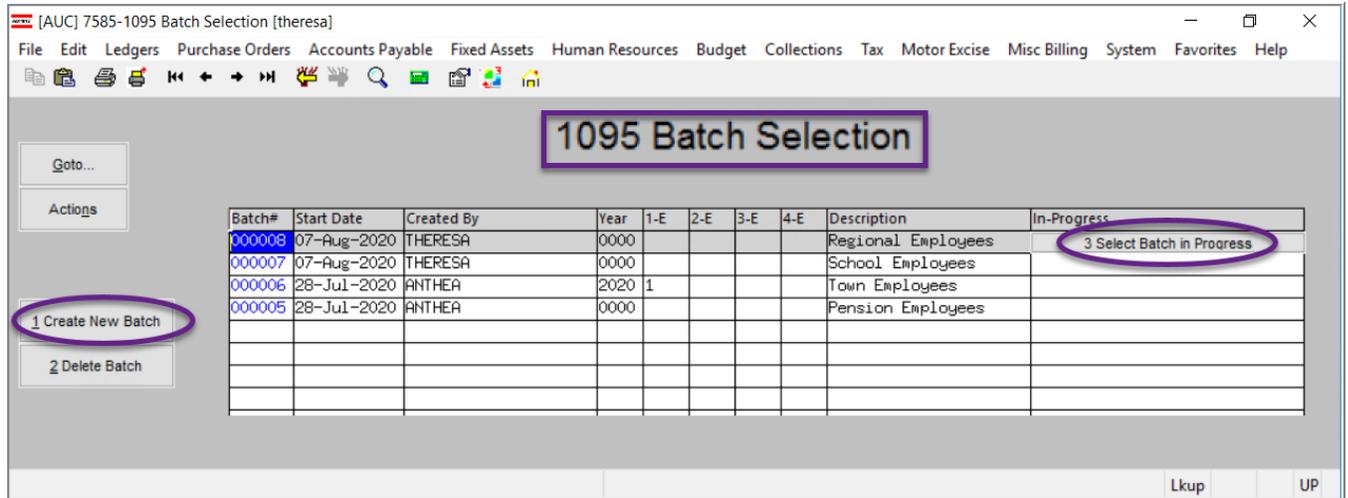
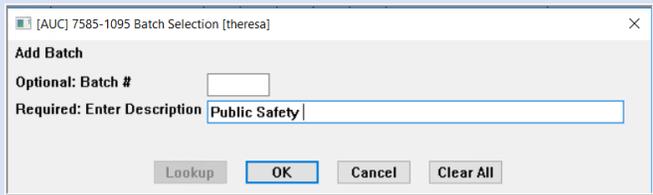
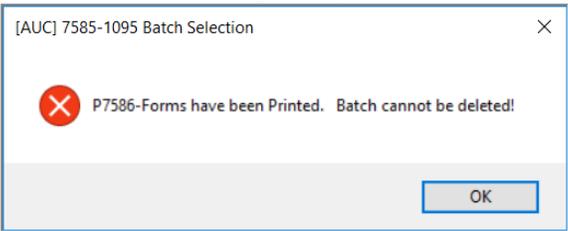


Figure 1 1095 Batch Selection screen

Table 1

Screen Component	Description
[1 Create New Batch]	<p>Use this button to create new batches for different entities within the municipality. This is helpful if multiple users are doing 1095s for their responsibility area. A user can have multiple batches running at the same time, and the previous batch need not be complete before starting a new batch. If desired, a batch number may be entered, or the system will assign the next available number. Enter the Required Description when creating the batch; it will allow for easily finding the correct batch when returning to the steps</p>  <p>menu to continue processing.</p>
[2 Delete Batch]	<p>Allows deleting an existing batch and starting again. Batches may be deleted up to the point where the 1095 forms are printed. Once 1095 forms are printed, the batch cannot be deleted. Attempting to delete a batch that has already been printed will result in the error message:</p> 



Screen Component	Description
[3 Select Batch in Progress]	This button displays the steps menu for 1095 processing. Use the up and down arrows to select the desired batch and click on the button to bring up the steps menu for the batch to be worked on.
Batch #	Either enter a numeric batch number or allow the system to assign a batch number. Once the batch is created the sequence number cannot be changed by the user. The batch number is a unique sequence number assigned so that multiple 1095 processes can be run simultaneously and allow different users to access the same process.
Start Date	Indicates the date the batch was created.
Created By	Shows which user created the batch. ALL users that have access to this menu item can access any of these batches. There is no restriction on who can see which batch.
Year	This value will be filled in once the step in the menu is run that identifies the year for the processing.
1-E -4-E	If multiple entities are specified in the steps menu, up to four entities will be shown on the screen. If all entities are selected, these field will not be populated.
Description	The description as entered when creating the batch. It cannot be edited after the batch is created

1.1 Completed Batches

This will be available *after* closing the 2020 year (so after the first cycle is complete)–select:

[Actions] ▶ Closed Batches

The screenshot displays the '1095 Batch Selection' application window. The main data table is as follows:

Batch#	Start Date	Created By	Year	1-E	2-E	3-E	4-E	Description	In-Progress
000016	18-Aug-2020	THERESA	0000					no batch number enter	3 Select Batch in Progress
	8-Aug-2020	THERESA	0000					what batch number?	
	7-Aug-2020	THERESA	2020	1				Public Safety	
	7-Aug-2020	THERESA	0000					School Employees	
	8-Jul-2020	ANTHEA	0000					Pension Employees	

The 'Closed Batches' dialog box shows the following data:

Batch#	Archive Dat	Start Date	Created By	Description	Year	1-Entity	2-Entity	Tot
000015	18-Aug-2020	18-Aug-2020	THERESA	post cleanup run for 2019	2019	1		
000013	14-Aug-2020	14-Aug-2020	THERESA	1095C report dissociated	2020	1		
000012	14-Aug-2020	14-Aug-2020	THERESA	set default printer 4 suc	2020	1		
000011	14-Aug-2020	14-Aug-2020	THERESA	Not Self Insured on Entit	2020	1		
000010	13-Aug-2020	11-Aug-2020	THERESA	try a 2021 batch to test	2021	1		
000008	12-Aug-2020	07-Aug-2020	THERESA	Regional Employees	2019	1		
000006	14-Aug-2020	28-Jul-2020	ANTHEA	Town Employees	2020	1		
000001	20-Mar-2020	12-Dec-2019	ANTHEA	All Employees	2019			



The result will show all the closed batches as of the current date. This is a simple lookup; no drill down is available from the screen. The fields are described below:

Table 2

Column Header	Description
Batch #	The batch # assigned when the batch was created
Archive Date	This is the date the last step was run – the save archive/attach
Start date	Date this batch was created
Create by	The user who created the batch
Description	The description of the batch as entered when the batch was created (see Table 1)
Year	The year for which the process was run
1-Entity/2-Entity	Up to two entities will be shown if any entity selection was made

2 Reset 1095 Menu Reset 1095 Menu

This will remove all work files and clear the date, start time, and end time. This only needs to be run if starting over again.



Note: Once the Generate IRS Export File step has been run this option will no longer be available.

3 Payroll W2 1095 - C Payroll W2 1095-C Entity Table

The screenshot shows the 'Payroll W2 1095 - C' form. The 'Entity' dropdown is set to 'TOWN OF ADMINS' and 'W-2' is selected. The form includes fields for Name, Address, City, State, Zip Code, Phone, Fed Tax ID, and State Tax ID. Below these are tabs for '1 Payroll W2', '2 Payroll W2-ACA', '3 Payroll 1099-R', and '4 Payroll 1099-R-ACA'. The '4 Payroll 1099-R-ACA' tab is active, showing fields for Transmitter Control Code (1), Plan Start Month (07), Coverage Offered to Employee (Spouse, Dependents), Coverage is Provided (3), and a Self-Insured Plan? (Yes/No) radio button. There are also checkboxes for HSA Plan, HRA Plan, Employer Zip Code, and Resident Zip Code. At the bottom, there are sections for '1094 Line 22 (select all that apply):' with options A, B, C, and D, and '1095 Line 14 Overall Value:' with a grid for months. A '1095 Line 15 For Codes 1B,1C,1D,1E,1J,1K,1L,1M,1N,1O,1P or 1Q:' section follows with a grid for months. Callouts provide instructions: 'This data will be used on the Applicable Large Employer Member section of the form - same as the W2 and 1099R' points to the entity info; 'Enter the name and phone number to print on line 10 of the 1095C provided to the employee' points to the employee name and phone; 'The data here corresponds to the line numbers on the printed 1095C forms' points to the 1094 and 1095 sections; 'For Pensioners, go to the [4_Payroll_1099-R_ACA] table' points to the 4 Payroll 1099-R-ACA tab; 'Transmitter control number and Plan start month fields are required - the HSA Plan checkbox may be left blank if the entity is not offering an HSA plan' points to the Transmitter Control Code and Plan Start Month fields; 'Check all boxes that apply for a qualifying offer method' points to the coverage checkboxes; 'Indicate if coverage is provided via a self-insured plan' points to the Self-Insured Plan? radio button; 'Lines 14 and 15 - if "All 12 Months" field has data, do not enter data in the Month fields. If different values are needed for part of the year, leave the "All 12 months" blank & fill in the value for each month' points to the 1095 Line 14 and 15 grids.



4 ACA Filing Table

When starting a new tax year, click **[Add New]** and enter the new Tax year, for example, 2020. This screen will list all the entities in the entity table. Return to complete this table after submitting files to the IRS in step 11.

Entity	Description	TCC#	Original Receipt#	Correction Receipt#
1	TOWN OF ADMINS	XYZZZ		
2	Town of ADMINS Fire DL	222	A	B
3	School of ADMINS	222		
4	Regional School of ADM	BBGRT		

- After submitting an **Original** file to the IRS –enter the Submission Receipt# in the Original Receipt# column [A]
- After submitting any **Correction** files – enter the Submission Receipt# into the Correction Receipt# column [B]

5 Bargaining Unit - Affordable Care Act

To enter data for a bargaining unit, check the **“Override Entity Table”** box. Fill in the Plan start month and the HSA Plan checkboxes for the bargaining unit. The HRA plan box must be checked if used, and either the Employer or Resident Zip Code box checked. This zip code will print on line 17 of the forms issued to the employee and determines if dollar criteria are met. 1L, 1M, or 1N should be used for resident zip codes; 1O, 1P, 1Q should be used for place of employment zip codes.

Line 14

If this bargaining unit offered or terminated coverage during the year, indicate the types of coverage offered for each month during the year.

Line 15

If this bargaining unit was offered coverage that differs from the rest of the employees, and the cost for the lowest priced “single” plan option was different, enter the employee’s share of the monthly premium here.



6 ACA 1095 Audit Report ACA Audit Reports

This process verifies the data in the Entity, Bargaining Unit Tables, and the Employee ACA tab on Employee Maintenance screen. This does not check for build errors – see step 7 below. There are four reports produced from this step:

1. Lists any errors found on the Entity Table (Payroll W2 ACA)
2. Lists any errors found on the Bargaining Unit table ACA tab
3. Lists any errors found on the Employee ACA tab
4. Lists any New Hires or Terminations between 01/01/Tax Year and 12/31/Tax Year

7 Build 1095 File Build 1095 File

This process will collect all employees that qualify for a 1095C for the entity or entities entered and apply the general rules for coding lines 14, 15 and 16 on the 1095. This step also checks for errors and will produce up to two reports: 1. The ACA Register (always produced), 2. An error report (if any errors are found).

7.1 Sites with a Single Entity

Enter the Tax year and leave the **Optional: Enter up to 9 Entity Codes** blank.



7.2 Sites with multiple Entities but Process Run by one person

If the site has multiple entities, **but the entire 1095 process is run by one individual**, then also leave the **Optional: Enter up to 9 Entity Codes blank**. The **[Build 1095]** step will include all entities, and provide the option to selectively print, email, and export each entity separately.

7.3 Sites with Multiple Entities and Each Entity Is Run by Separate Individuals

Use the **[Edit]** button and enter the Entity code for the entity being processed. A single entity or the selected entities will be available to review.

8 Edit 1095 File

This step will display a preview of the 1095C form.

8.1 Modify Existing Employee Records

This screen allows modifying an employee that does not follow the standard rules for applying the codes and amounts to lines 14, 15 and 16. Once modifications are complete, click **[Check for Errors]**; this will make sure that all information is still valid. Any errors must be corrected before printing the 1095 forms.

1 2020 Edit 1095 Work File

Employee# 000012 | 1 Name of Employee MARIE R HOLMES | 2 SS# [redacted] | Reporting Entity 1 | Report Bargaining Unit [redacted]

3 Street Address 39 FIELD POND RD | 4 City or Town CAMBRIDGE | 5 State MA | 6 Zipcode 02138-0000 | 8 Employer ID 041234567 | 10 Contact Phone (617) 494-5100 x 2116

7 Name of Employer [redacted] OF ADMINS | 12 State MA | 13 Zipcode 02110-0000

5 Remove Employee | 6 Add Employee

These dates correspond to dates on the ACA tab of the Employee Maintenance screen

ACA Offer Start 07-Sep-1982
ACA Reporting Start/End 07-Sep-1982
ACA Full Time Start/End 07-Sep-1982 30-Jun-2016
ACA Declined

Lines 14, 15 and 16 are editable fields to manage "one off" employees when the standard rules do not apply

EMPLOYEE OFFER AND COVERAGE										
Employees Age on January 1										
	12 Mths	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
14 Offer of Coverage	1G									
15 Employee Share										
16 Applicable Section										
17 Zip Code										

COVERED INDIVIDUALS If Employer provided self-insured coverage, check the box (e) Months of Coverage

(a) Name of Covered	(b) SS#	(c) DOB	(d) 12 Mth	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
18 MARIE R HOLMES	XXX-XX-1005		X												
19 PAUL M CONSIGLI	XXX-XX-5001		X												



8.2 Remove Employees That No Longer Need A Form

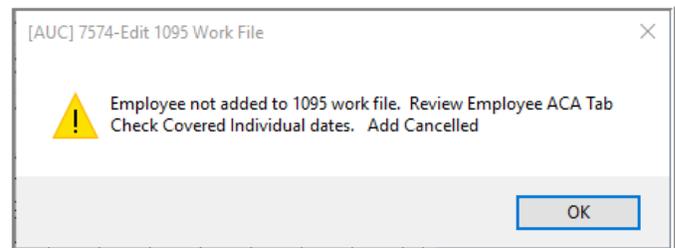
Click **[5 Remove Employee]** to remove an employee if they no longer require a 1095 form. Use this also if a value is changed on the employee maintenance screen to remove the employee, then re-add the employee with the new values.

8.3 Add Employees that were Missed

Click **[6 Add Employee]** for additional employees to be added to the 1095 process if they were missed. Make sure the **Employee ACA** tab on the **Employee Maintenance** screen is updated before adding a missed employee. Use this also to re-add an employee if they were removed to make changes in the employee maintenance screen.

8.3.1 Employee with No Covered Individuals *[Revised December 2021]*

When adding an employee for whom there are no covered individuals, the system will display this pop-up message:



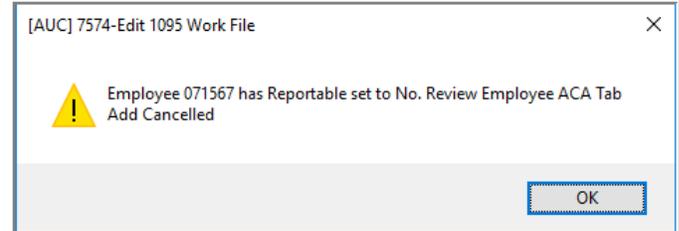
Add covered individuals on the **Employee Maintenance** ▶ **ACA** tab and try again.

8.3.2 Employee with the Reportable Flag set to No *[Revised December 2021]*

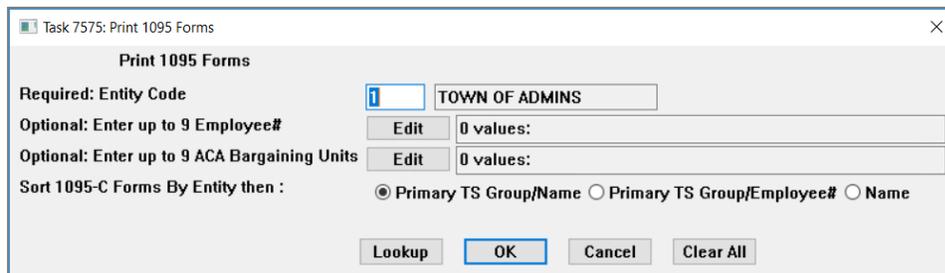
Reportable?
 Yes
 No

When adding an employee, if the **Reportable?** radio button is set to **No** on the

Employee Maintenance ▶ **ACA** tab, the system will display this pop-up message: Return to the Employee Maintenance screen to change the **Reportable?** radio button to **Yes** and try again.



9 Print 1095 Forms Print 1095 Forms



This gives options when printing 1095 forms. Initially print them all for each Entity selected in the **[Build 1095 File]** step. If there are changes made to the file, options allow the reprint of a single 1095 for an employee or up to nine employees or reprinting 1095 forms for a single bargaining unit or up to nine bargaining units. The forms will be displayed in the **ADMINS** Crystal Reports Viewer (**AdmCrv**) window:



1095C - AdmCrv

File Help /1172

Print the forms using the print button on the ADMINS Crystal Reports Viewer (AdmCrv) window

Form **1095-C** Employer-Provided Health Insurance Offer and Coverage
 Department of the Treasury Internal Revenue Service
 Do not attach to your tax return. Keep for your records.
 Go to www.irs.gov/Form1095C for instructions and the latest information.

VOID
CORRECTED

OMB No. 1545-2251
2019

Part I Employee

1 Name of Employee (first name, middle initial, last name) | 2 Social security number (SSN)
 JOHN-JACOB-JEREMIA | Z | JINGLEHEIMERSHMICZ | XXX-XX-5444

3 Street address (including apartment no.)
 32 MORNING GLORY CIRCLE

4 City or town | 5 State or province | 6 Country and ZIP or foreign postal code
 BOSTON | MA | 02110

Applicable Large Employer Member (Employer)

7 Name of employer | 8 Employer identification number (EIN)
 TOWN OF ADMINS | 041234567

9 Street address (including room or suite no.) | 10 Contact telephone number
 219 LEWIS WHARF | (617) 494-5100 ext 2116

11 City or town | 12 State or province | 13 Country and ZIP or foreign postal code
 BOSTON | MA | 02110

10 Email 1095 Forms

Complete instructions for setting up Employees to receive forms 1095 electronically are found in [HR-575 Email Tax Forms to Employees](#).

Task 6713: Email 1095 Forms

Email 1095 Forms

Required: Enter Year

Required: Entity Code TOWN OF ADMINS

Optional: Enter up to 9 Employee#

Optional: Enter up to 9 ACA Bargaining Units

Sort 1095-C Forms By Entity then : Primary TS Group/Name Primary TS Group/Employee# Name

As with printing the 1095 forms, initially email forms to all employees that have consented to receive these forms electronically. If changes have been made to an employee that received an email copy, run this step again and just select a single employee to email them a copy of the revised form.

Employee Contact

Phone #1 (508) 473-5740 Type Home

Phone #2 (508) 450-9202 Type Cell

Phone #3 (000) 000-0000 Type

Email

DD Email Test Date

Electronic Form Date 31-Jan-2020 Consent Date 09-Dec-2019

Employees must be marked as consenting to receiving these forms electronically on the Employee Maintenance contact tab. Employees must be setup with an email address and the consent date must be set. See [HR-575 Email Tax Forms to Employees](#).

This step produces a report of employees to whom the 1095C forms will be emailed.



	A	B	C	D	E
1	Emp#	Employee	Email	Consent Date	
2	000012	HOLMES, MARIE R	wendy@admins.com	10/31/2020	
3	000020	POWERS, LYNN M	luann@admins.com	11/30/2020	
4	000031	BUSSEY, KEITH S	luann@admins.com	10/30/2020	
5	001255	CREASIA, KAREN	campbellt189@gmail.com	5/5/2019	
6	070785	DIROSA, KAREN J	theresa@admins.com	2/2/2020	
7	071305	NASH, MICHAEL P	THERESA@ADMINS.COM	11/1/2020	
8	071366	GONSALVES, LAWRENCE	theresa@admins.com	11/1/2020	
9	071454	ZUBAREV, KAREN L	campbellt189@gmail.com	7/7/2020	
10	071469	ALBANESE, KAREN T	theresa@admins.com	6/6/2020	
11	071483	PATERSON, LYNN M	luann@admins.com	10/20/2020	
12	071484	LOHMANN, KAREN P	support@admins.com	11/1/2020	
13					

11 Export 1095 to IRS

POINT OF NO RETURN

If time permits, wait a week or two in case there are corrections required. Once this step is run, the **[Reset 1095Menu]** and **[Build 1095 File]** steps will no longer be available. See also HR-700 Exporting 1095 Forms to the IRS.

This step assigns sequence numbers used by the IRS to process the file. The records sent to the IRS must be sequenced with consecutive numbers starting with "1"; if a correction file is required, the IRS knows to match sequence number "15" with the corresponding record number "15" that required correction.

This can be run multiple times for each entity. Detailed instructions are in [HR-700 ACA Exporting 1095 Forms to the IRS](#).

12 Generate IRS Corrections Export File

If an error is reported by the IRS:

- update the ACA filing table with the Submission Receipt# in the Original Receipt# column [A],
- send the error file to support@admins.com for review.



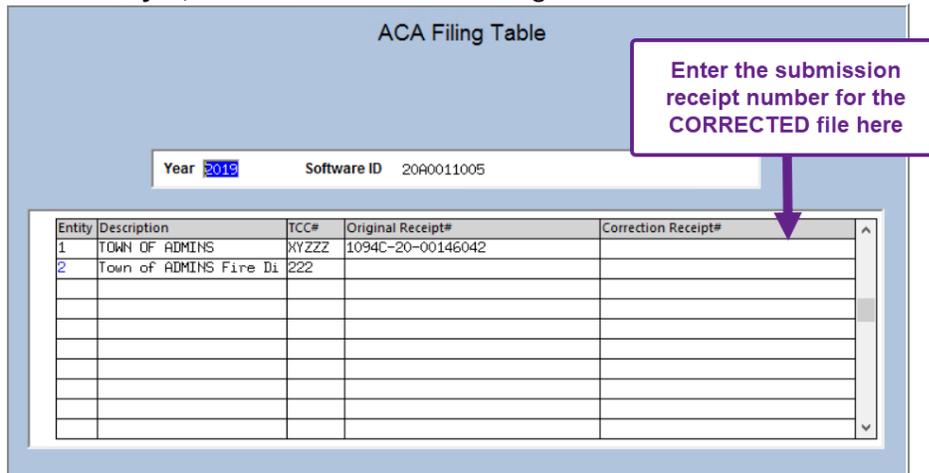
- **ADMINS** will interpret the report, mark the employee records with errors, and send a list back with corrections to be made.
- Make the corrections as instructed by **ADMINS**.

Once the corrections are complete, run this  step. This step checks that at least one record has been marked for a correction export. The process also checks that the original or correction receipt number has been entered on the ACA filing table.



All sites must run this step when corrections are made; however, for locations that require a combined file, run the step, and notify support@admins.com to create the corrections file.

When the corrections file is submitted, and the IRS provides a **submissions receipt number** for the **corrections file**, enter it here in the ACA Filing Table:



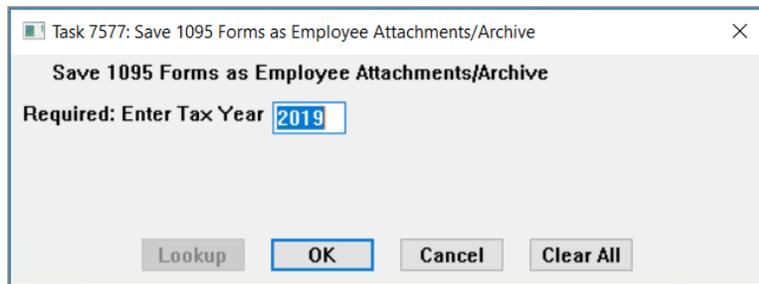
ACA Filing Table

Year: 2019 Software ID: 20A0011005

Entity	Description	TCC#	Original Receipt#	Correction Receipt#
1	TOWN OF ADMINS	XYZZZ	1094C-20-00146042	
2	Town of ADMINS Fire Di	ZZZ		

Do not run the [Save 1095 Forms as Employee Attachments/Archive] step until the corrections file has been accepted.

13 Archive Forms & Attach to Employee



Task 7577: Save 1095 Forms as Employee Attachments/Archive

Save 1095 Forms as Employee Attachments/Archive

Required: Enter Tax Year

Lookup OK Cancel Clear All

Once the submitted files have been **accepted by the IRS without errors**, run this step to attach the 1095 forms to the Employees' attachment screen. If an employee needs a copy, re-print it from the **Employee Maintenance Attachments** screen.