



# HUMAN RESOURCES

## RELEASE NOTES – DECEMBER 2019

This document explains new product enhancements added to the **ADMINS Unified Community (AUC)** for Windows **HUMAN RESOURCES** system.

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# 1 EMPLOYEE MAINTENANCE

ADMINS enhanced the **Employee Maintenance** screen with new fields on the **[1 Contact Tab]** and the **[8 Dates/Class]** tab.



## 1.1 [1 Contact Tab] [Enhancement]

The screenshot shows the 'Employee Maintenance' window for employee LYN N POWERS. The '1 Contact' tab is active. In the 'Employee Contact' section, the 'Electronic Form' field is highlighted with a purple box, displaying 'Send Date 09-Dec-2019' and 'Consent Date 09-Dec-2019'. Other fields include 'Phone #1', 'Phone #2', 'Phone #3', 'Email', and 'DD Email'.

ADMINS added two new fields to the **Employee Contact** section of the **Employee Maintenance [1 Contact]** screen.

The new fields are used in the Electronic Reporting of 1099R, W2, and 1095C forms at year end. See **HR-575 Email Tax Forms to Employees** in the Help Reference Library for a full description of how the fields are used.

[ADM-AUC-HR-10072]

## 1.2 [Dates/Class] Tab [Enhancement]

ADMINS added a new **Position Hire Reason** field under **Position Hire Date**. This will allow the user to enter up to sixty characters of a note on the position. See also section 5.3 below for the report that shows the new field.

The figure consists of two side-by-side screenshots of the 'Employee Maintenance' screen. The left screenshot, labeled 'Before', shows the '8 Dates/Class' tab highlighted with a purple circle. The right screenshot, labeled 'After', shows the 'Position Hire Reason' field highlighted with a purple box, containing the text 'Referee for Winter Sports'. The 'Position Hire Date' is also highlighted with a purple box, showing '15-Nov-2019'.

Figure 1 Before & After [Dates/Class] tab on the Employee Maintenance Screen

[ADM-AUC-HR-10144]



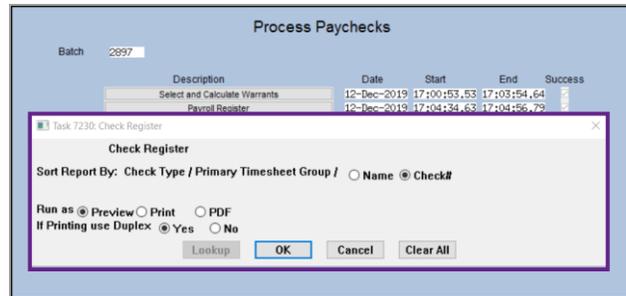
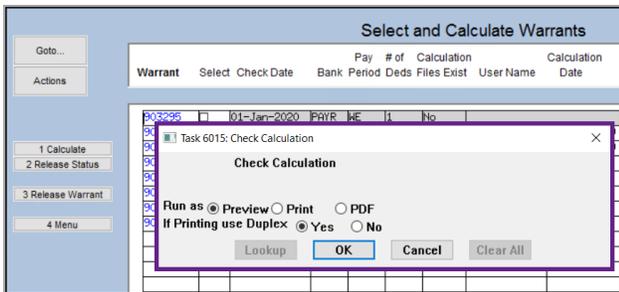
### 1.3 Setting Stop Dates When Adding a New Position [Fix]

The stop date for deductions and additional wages was being set to the **effective date** instead of the **termination date** when terminating a position. This was corrected and patched to sites in November and is mentioned here to document the change. The system will now populate the stop dates on the terminated position with the **termination date**.

[ADM-AUC-HR-10087]

## 2 PAYROLL PROCESSING [Enhancement]

Payroll processing was optimized to reduce processing time. Note this performance improvement in the **Check Calculation** and **Check Register** steps.



[ADM-AUC-HR-10171]

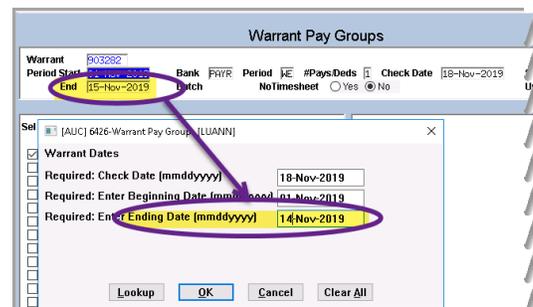
### 2.1 Posting [Enhancements]

ADMINS added a message to the **Post Labor Distribution/Email Advices** screen regarding the **Time and Expense Posting date**. In addition, the legend on the Labor Distribution Posting Reports was improved.

### 2.2 Post Labor Distribution Date [Fix]



Select **HR > Payroll Processing > Warrant/Create Timesheet Screen** to change the period end date on an in process warrant. The period end date is used as the default labor distribution posting date.



Before the software update, if a change was made to the **period ending date after** the warrant was created, the labor distribution Time and Expense posting date was not being updated. This has been corrected with the software update.



The message will indicate if the **1 Time and Expense Posting date is the same as the Period Ending Date**, or if it is not **2 Time and Expense Posting date is neither the Period Ending Date nor the Check Date**.

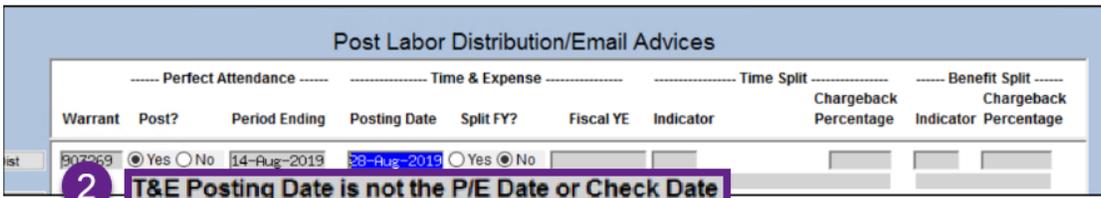
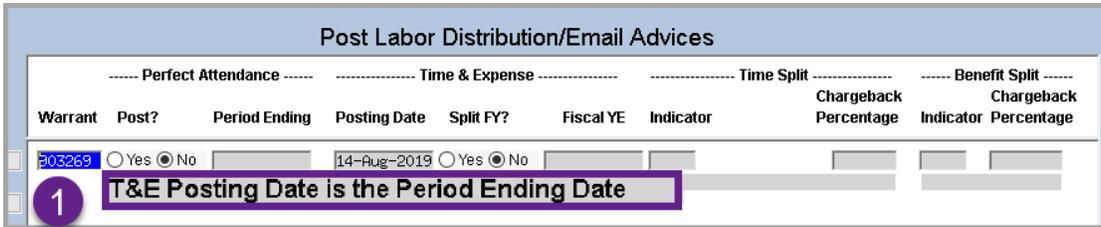
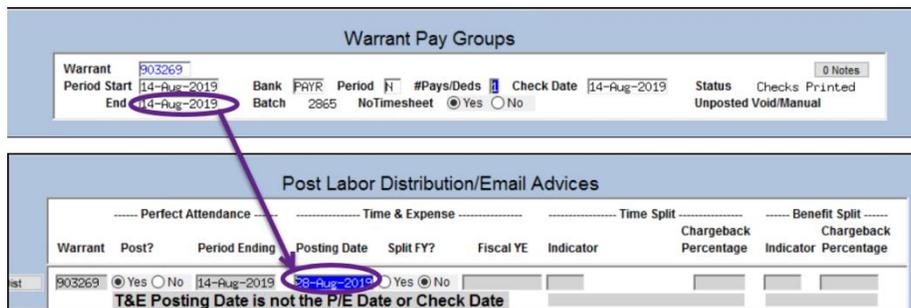


Figure 2 Screen showing the messages for the Time and Expense Posting Date

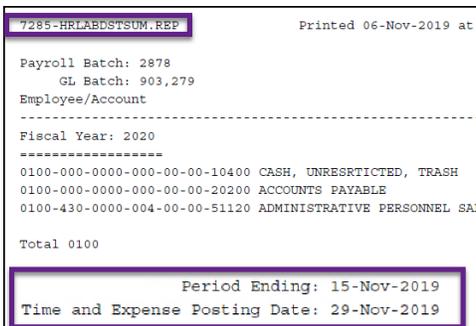
[ADM-AUC-HR-10157]

### 2.3 Labor Distribution Reports Legend [Enhancement]



If necessary, it is possible to **OVERRIDE** the posting date when posting the labor distribution. The Labor Distribution Posting Reports were updated to print a legend indicating that the date was changed.

Figure 3 Example of a warrant with an override on the Time and Expense Posting date



The legend will show the Period Ending Date and the Time and Expense Posting Date and will appear on the report on the last page for each warrant processed within the batch.

Figure 4 Labor Distribution Report Legend showing the Period Ending Date differs from the Time & Expense Posting Date

[ADM-AUC-HR-10120]



## 2.4 Balancing FICA as the Year Comes to a Close [Info]



**ADMINS** support gets inquiries in the fourth quarter of the year when payroll staff balance **FICA** and the calculated estimates are higher than actuals. This may happen when highly paid employees reach

the **FICA** annual maximum contribution as the end of the year approaches.

1 Bucket	2 Description	Annual Maximum	W2 Box	W2 Desc	1099-R
1	Federal Tax Wages		01		01
2	Medicare Wages		05		01
3	State Taxable Wages		16-#1		01
4	Retirement Wages				
5	Total Wages				01
6	Workers Comp				
7	Federal Taxes				04
8	State Taxes				12-#1
9	Reportable Health Care Cost				
10	FICA	132900.00			
11					
31					

Calendar Year Annual Maximums	
Bucket Amount	\$
Employee Contribution	\$ 8239.80
Employer Contribution	\$ 8239.80

The tax year **FICA** limit is entered in the **Base Bucket Table** and some sites set the annual maximum deduction/benefit in the **Cost Code Table**. Be sure to review report **6162-HRFICALIMIT** report, generated every warrant during the payroll calculation step, to identify situations when an employee has exceeded the **FICA** limit.

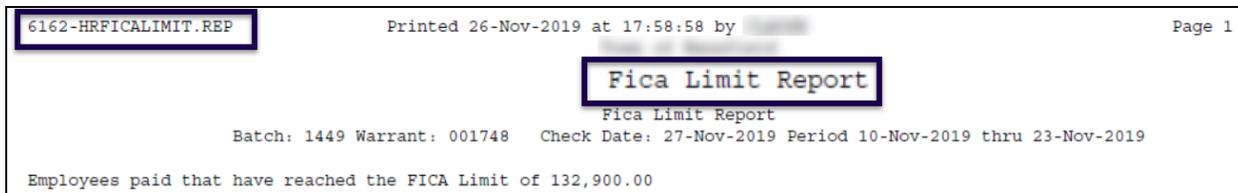


Figure 5 FICA Limit Report – Available when Payroll is calculated and in the Warrant History Screen after the fact

If the **Base Bucket** and **Cost Code Tables** are set up with the annual maximum contributions, the system will **stop** the **FICA** withdrawals and the report can be viewed as informational. If there are no maximums set in the Base Bucket and Cost Code Tables, create a correction warrant if excess **FICA** is withheld.

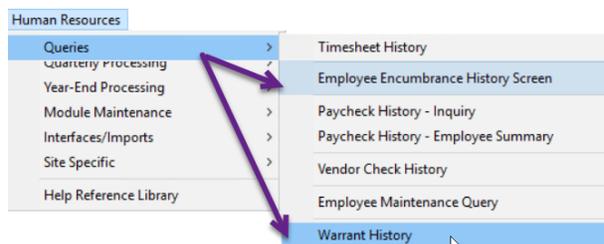
[ADM-AUC-HR-9945]

## 3 MANUAL CHECK PROCESSING [Fix]

When a manual check that had tax amounts was recalculated, and the recalculated taxes were zero, the original amount still appeared on the manual and the total deductions shown were incorrect. This was corrected.

[DNV-SUP-SAPLAUC-544]

## 4 QUERIES



**ADMINS** added features to the **Employee Encumbrance History** and **Warrant History** screens.

Access the screens by selecting **Human Resources** ► **Queries**. Each change is described below.

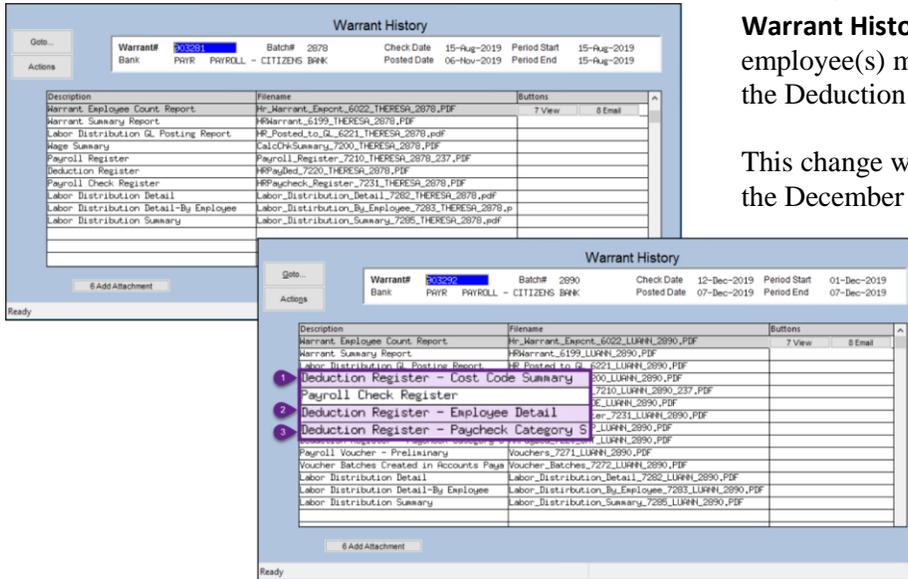


## 4.1 Warrant History Screen [Enhancement]

ADMINS added three **Deduction** reports to the **Warrant History** screen. This shows which employee(s) match up to the dropped amounts on the Deduction Register.

This change will affect only warrants posted *after* the December 2019 software update.

The three reports are the **Deduction Register – Cost Code Summary**, the **Deduction Register – Employee Detail** and the **Deduction Register – Paycheck Category Summary**.



[ADM-AUC-HR-10135]

## 4.2 Employee Encumbrance History [Enhancement]

ADMINS added three buttons to the **Employee Encumbrance History** Screen. This is an easy way to trace all employee encumbrances and provides reports that list all salaries, encumbrances, and amounts paid all in one spot.



Figure 6 Before – only three buttons on the screen – [1 Excel], [2 Menu], and [3 Excel Summary]

### 4.2.1 [1 By Account/By Employee] Toggle

The [1 By Account] button is a toggle that switches the view from “By Employee” to “By Account”. When toggled to the “By Account” screen, the screen displays the data by Fiscal Year and Account. In addition, the button changes to [1 By Employee]. Click on [1 By Employee] to return to the original “By Employee” screen, displaying the data by Fiscal Year and Employee.









## 5.2 #6662 Employee List–Benefits– Additional Filtering Options [Enhancement]

ADMINS enhanced the #6662 Employee List–Benefits report with additional filtering options. Now, the report may be run for up to nine Employee #s, Timesheet Groups, Bargaining Units, and Pay Groups. Click **Human Resources** ► **Reports** ► **Report Library** ► **[1 By Employee]** ► **6662–Employee List – Benefits** to **[Run]** the report.

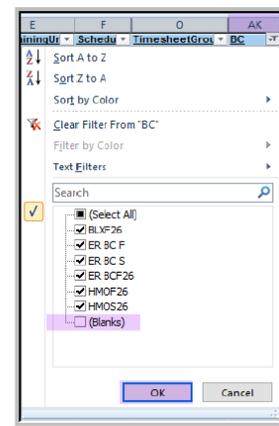
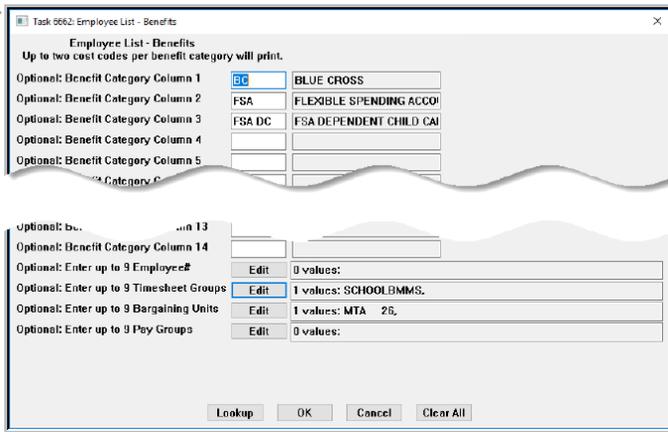
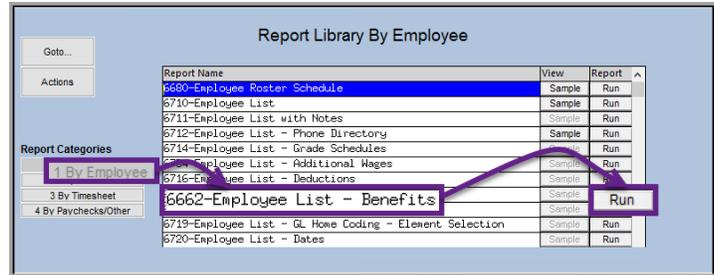


Figure 12 The report prompt and the filter button in Excel®

In **Figure 12**, three benefit categories are selected, for a single timesheet group **SCHOOLBMMS** and bargaining unit of **MTA 26**. The spreadsheet lists all employees belonging to the selected timesheet group and bargaining unit. The column headings show the selected categories (see columns **AK–AM** and **AY–BA**); up to two cost codes per benefit category will print.

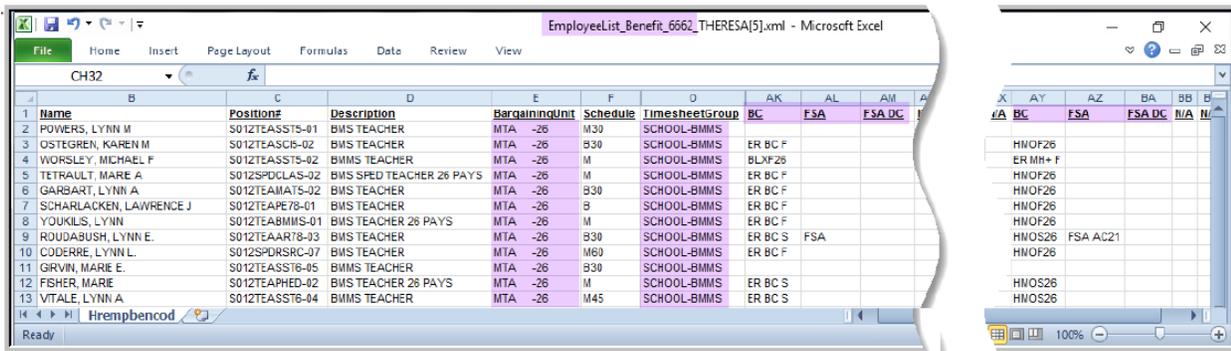


Figure 13 Report #6662 Employee List – Benefits with optional filters

To restrict the output to only the employees using the benefit categories, use the Auto Filter tool in **Excel®** as shown in **Figure 12**. Select only the non-blank records in column **AK**, the first column with data in the spreadsheet.

[ADM-AUC-HR-10145]



### 5.3 #6708 Employee List – Benefits with Annual Amounts [Enhancement]

Report Name	View	Report
6680-Employee Roster Schedule	Sample	Run
6710-Employee List	Sample	Run
6711-Employee List with Notes	Sample	Run
6712-Employee List - Phone Directory	Sample	Run
6714-Employee List - Grade Schedules	Sample	Run
6754-Employee List - Additional Wages	Sample	Run
6716-Employee List - Deductions	Sample	Run
6662-Employee List - Benefits	Sample	Run
<b>6708-Employee List - Benefits with Annual Amounts</b>	Sample	Run
6710-Employee List - GL Home Coding	Sample	Run
6719-Employee List - GL Home Coding - Element Selection	Sample	Run
6720-Employee List - Dates	Sample	Run
6487-Employee List - Active	Sample	Run

ADMINS added a new report to the Employee Lists menu. The report provides benefit projections with annual dollar amounts for up to eight benefit categories, and shows one row per employee number when the cost code is a fixed amount.

Access the report by selecting **Human Resources** ▶ **Reports** ▶ **Report Library** ▶ **[1 By Employee]** ▶ **#6708 Employee List – Benefits with Annual Amounts**. This

report is available as an **Excel®** spreadsheet.

The screenshot shows the configuration window for the report. It includes fields for selecting benefit categories (DE, ME, BC) and a 'Lookups' button. A 'Categories' dialog box is open, showing a list of benefit categories with columns for Category, Description, Status, and ToF.



Figure 14 Prompt for the Employee List – Benefits with Annual Amounts Report

An example is provided in **Figure 15**. This Excel output is being filtered as described in **Figure 13**.

Emp#	Name	Position#	Description	BargainingUni	LIFEAI	ME	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV
181	008038 DROUIN, MICHAEL	S003CUSHEAD-03	HEAD CUSTODIAN	AFL -AF		MEDI									ALT FAM	724.88	
183	007008 AMBLER, LAWRENCE V.	S012CUS1STS-01	CUSTODIAN	AFL -AF		MEDI									ALT FAM	724.88	
198	007111 LAFERRIERE, LAWRENCE E.	S006CUS2NDS-02	CUSTODIAN 2ND SHIFT	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
206	007181 POISSON, KEITH J.	S006CUSCUST-01	CUSTODIAN	AFL -AF		MEDI									ALT FAM	724.88	
217	007682 DEFLAMINIO, LAWRENCE	S189CUSMCUS-01	MUNICIPAL BUILDING CUSTODIAN	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
228	007737 PETERSON, KEITH P.	S006CUS2NDS-04	CUSTODIAN	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
235	007782 GEROMINI, LAWRENCE R.	S006CUS2NDS-02	CUSTODIAN 2ND SHIFT	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
457	070168 GLENNON, MICHAEL G.	S012CUSHEAD-06	HEAD CUSTODIAN	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
487	070270 BOGAN, MARIE M.	S008SPDCLRK-01	CLERK 12 MONTH	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
536	070447 SPILLMAN, MICHAEL R.	S006CUS2NDS-02	CUSTODIAN 2ND SHIFT	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
847	071167 SULLIVAN, MARIE	S003CUS2NDS-02	CUSTODIAN	AFL -AF		MEDI				ER BC F			HMOBF		ALT FAM	724.88	
997																	

Figure 15 Employee List – Benefits with Annual Amounts Report (some columns and rows hidden to highlight detail)

[ADM-AUC-HR-10161]



## 5.4 #6706 Account Transactions & #6707 Employee Transactions [Enhancement]

Report Library By Employee

Report Name	View	Report
6266-Employee List - Cost of Leave - Default Fund	Sample	Run
6604-Employee List - Cost of Leave as of a Date - Def. Fund	Sample	Run
6079-Employee Leave Balance Listing	Sample	Run
6609-Negative Leave Balance Listing	Sample	Run
6176-Leave History (Attendance) Report	Sample	Run
Employee Leave Time over XX Days/Hours	Sample	Run
Employee Profile Audit Report	Sample	Run
6715-Employee List - Salary Level for Date Range	Sample	Run
6144-Paid Labor Costs for a Period - Expected Amount	Sample	Run
6125-Employee Encumbrance Balance Report	Sample	Run
6140-Employee Encumbrance Summary	Sample	Run
6706-Excel - Account Transactions	Sample	Run
6707-Excel - Employee Transactions	Sample	Run

These new encumbrance history reports show transactions for encumbered pay codes. The reports are described in section 4.2.2 and 4.2.3 of this document. Click on **Human Resources > Reports > Report Library > [1 By Employee]**. These new encumbrance history reports are at the bottom of the list.

[ADM-AUC-HR-10158]

## 5.5 #6726 Employee List – New Hires – New “Position Hire Reason” column

Report Library By Employee

Report Name	View	Report
6722-Mailing Label CSV File	Sample	Run
6724-Employee Profile Cards	Sample	Run
6726-Employee List - New Hires	Sample	Run
6728-Employee List - Terminations	Sample	Run

As shown in Figure 16 and Figure 17, the 6726 Employee List – New Hires report shows the Position Hire Reason. The field, described in Section 1.1 of this document; is found on the **Employee Maintenance > Dates / Class** tab.

EmployeeList\_NewHire\_6726\_ (1).x

Emp#	Name	Position Hire Date	Position Hire Reason	Position#	Description	BargainUnit	PayGroup	TimeshtGroup	M.F.S
071343	JONES, KAREN R	15-Nov-2019	Referee for Winter Sports	009ATHOTH-01	SPORTS OFFICIAL	NON-NO	BI	SCHOOL-BHS	F

Figure 16 Employee List – New Hires report run as Excel® shows the Position Hire Reason

TedRE - EmployeeList\_NewHire\_6726\_THERESA[1].lis

6726-HREMPST\_NEWHIRE.REP Printed 15-Nov-2019 at 15:32:56 by THERESA

Emp#	Name	Position Hire Date	Position Hire Reason	Position#	Description	Bargaining Unit	Pay Group	Tim. Gro
071941	DRAGON, MARIE	22-Aug-2019		0003SPDCLAS-02	DIPIETRO SPED TEACHE	MTA-26	26	SCH
071283	ESPOSITO, KAREN	26-Aug-2019		0066ABATECH-01	APPLIED BEHAVIOR ANA	AFLBHV10-MSEC	12 MTH	SCH
004041	GAMACHE, LYNN	16-Sep-2019		0009SUBCLRK-01	SUBSTITUTE CLERICAL	NON-NO	WE	SCH
071943	JONES, KAREN R	15-Nov-2019	Referee for Winter S	009ATHOTH-01	SPORTS OFFICIAL	NON-NO	BI	SCH

#Emps: 12 #Positions: 12

Selection Legend:

Sorted by: Position Hire Date  
Position Hire Date (range): 08012019 and 11302019



Figure 17 Employee List – New Hires report run as Print/Preview/PDF® shows the Position Hire Reason

[ADM-AUC-HR-10144]



## 6 TABLES ▶ Leave Accrual Rules [Enhancement]

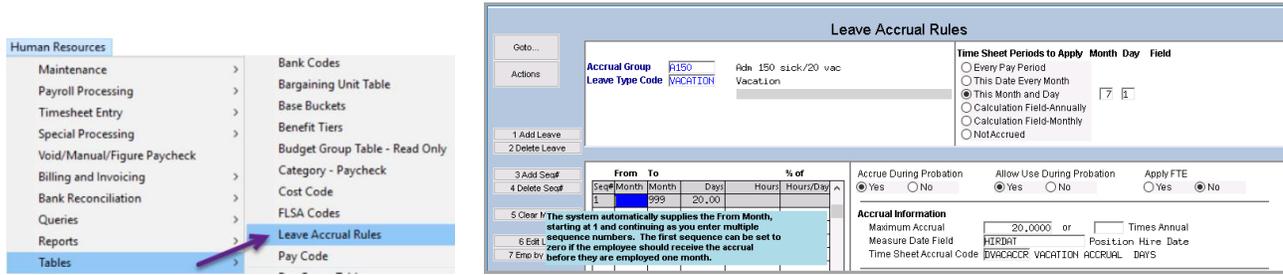
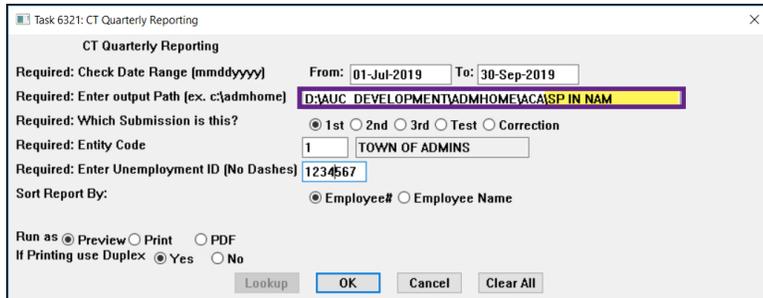


Figure 18 Human Resources ▶ Tables ▶ Leave Accrual Rules

ADMINS changed the **first** value for the “From” month to allow a **zero** to permit employees to accrue time even if they have not been employed one full month. The default value is **one**, but can be changed to **zero**. The “From” month will not display a value if changed to **zero**.

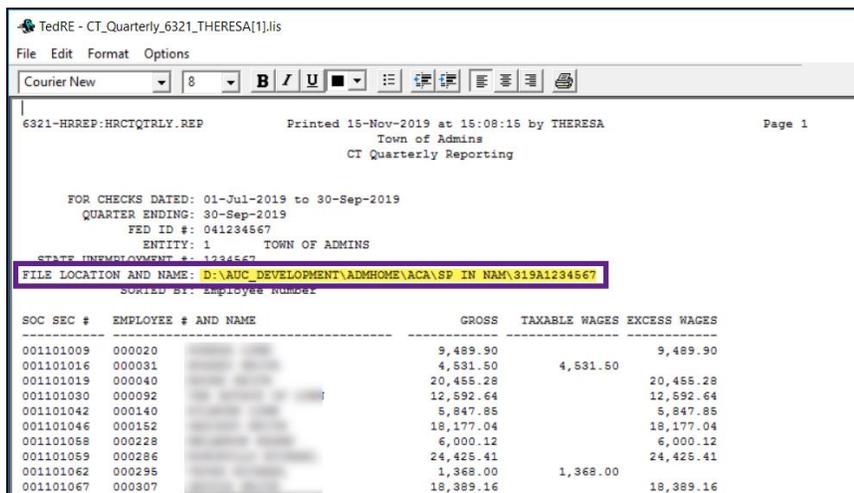
[ADM-AUC-HR-10154]

## 7 QUARTERLY PROCESSING ▶ CT ▶ Spaces in File Path [Enhancement]



Prior to the software update, the output path (file location) for the **Connecticut Quarterly Export** was not permitted to contain spaces.

Figure 19 Prompt for CT Quarterly Reporting now allows spaces in the output path



ADMINS changed the process to allow spaces in the file location name.

This prompt will retain and re-display the data entered for the next time the procedure is run.

Figure 20 Report showing spaces in the directory path

[ADM-AUC-HR-10116]



## 8 YEAR END PROCESSING – W2, 1099R and 1095C

ADMINS now offers the option to email year-end tax reporting forms to employees. In addition, ADMINS updated the **ACA Filing Table Software ID**. Please see the Instructions to update the **ACA Filing Table** for the 2019 tax year in section 8.1.4. To streamline processing, ADMINS added optional selection fields when building the **ACA** files and printing the **1095C** forms.

### 8.1 Emailing W2, 1099R, and 1095C Forms

ADMINS added an optional step to the **W2, 1099R** and **1095C** steps menu. Now, employees who provide consent may receive these forms via a secure, encrypted email.

#### 8.1.1 W2 Processing Steps Menu Review W2 Forms Step [Enhancement]

The **[Review W2 Forms]** screen will display a message in red in the “e Employee’s Name” section identifying this **W2** as an emailed form and showing the address to where it will be sent.

\*Note: Forms that are emailed will not be produced in the **Print W2 Forms** step.

Both printed and emailed forms will be available as attachments after running the final step in the menu:

Review W2 Forms			
Entity: TOWN OF ADMINS	Employee #: 000062	SS#: 001-10-1024	
b Employer identification number (EIN): 041234567	1 Wages, tips, other compensation: 3400,00	2 Federal income tax withheld: 386,37	
c Employer's name, address and zip code: TOWN OF ADMINS 219 LEWIS WHARF BOSTON, MA 02110	3 Social security wages	4 Social security tax withheld	
	5 Medicare wages and tips: 3400,00	6 Medicare tax withheld: 49,30	
	7 Social security tips	8 Allocated tips	
d Control number: SCHOOL-SCHOOL	9 Verification Code	10 Dependent care benefits	
e Employee's Name: LYNN E. MCDONOUGH 199 LINCOLN ST. CAMBRIDGE, MA 02138	11 Nonqualified plans	12a See instructions for box 12	
	13 Stat EE R,Plan 3rdPty	12b	
	14 Other	12c	
	f Employee's address and ZIP code	12d	
15 State Employer's state ID number: MA 041234567	16 State wages, tips: 3400,00	17 State income tax: 171,14	18 Local wages: 19 Local tax: 20 Name:

#### 8.1.2 W2 Processing Steps Menu Email W2 Forms Step [New]

**W2 Processing**

Description

- Reset W2 Menu
- W2 Entity Table
- Build W2 File
- W2 Audit Report
- Review W2 Forms

Print W2 Forms

**Email W2 Forms**

Federal W2 File

CT W2 File

MA W2 File

RI W2 File

Save W2 Forms as Employee Attachments/Archive

Email W2 Forms

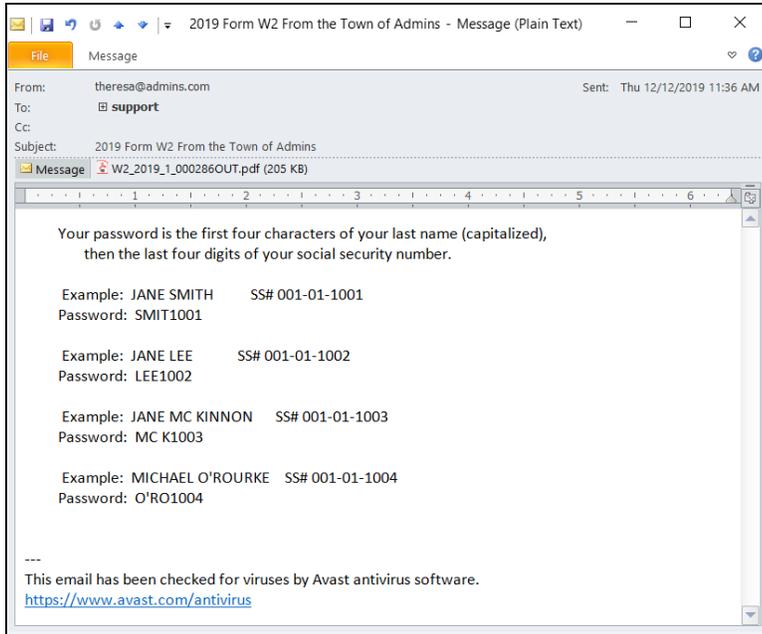
File Help

Starting step 63

Starting step 64

This step will send emails to consenting employees and create an **Excel®** report listing the employee number, name, email, and date consent was received.

Emp#	Employee	Email	Consent Date
000020	POWERS, LYNN M	campbell189@gmail.com	12/9/2019
000062	MCDONOUGH, LYNN E	wendy@admins.com	12/8/2019
000205	DOUGLAS, MICHAEL R	anthea@admins.com	12/10/2019
000286	MINCHILLO, MICHAEL J JR	support@admins.com	12/10/2019
071331	GROSS, KAREN	luann@admins.com	12/9/2019
071340	PERRY, KEITH	theresa@admins.com	4/1/2017
071341	DRAGON, MARIE	theresa@admins.com	12/1/2019



The email sent to the employee will have an encrypted, password protected **PDF**<sup>®</sup> attachment of the **W2** Form.

The email will be similar to the one sent out for Direct Deposit advice with payroll. The subject of the email will be “2019 Form W2 from the Town of \* ” (the Town of \* will be replaced with the community name as defined in Module Control #2).

The body of the email will give instructions on how to open the encrypted, password protected **PDF**<sup>®</sup> attachment.

[ADM-AUC-HR-10169]

### 8.1.3 1099R Processing Steps Menu Review 1099R Forms Step [Enhancement]

Review 1099 - R Forms

The review 1099R Forms screen will display a message in the “RECIPIENT” section identifying this **1099R** as an emailed form and showing the email address to where it will be sent.

\*Note: Forms that are emailed will not be produced in the **Print 1099 - R Forms** step.

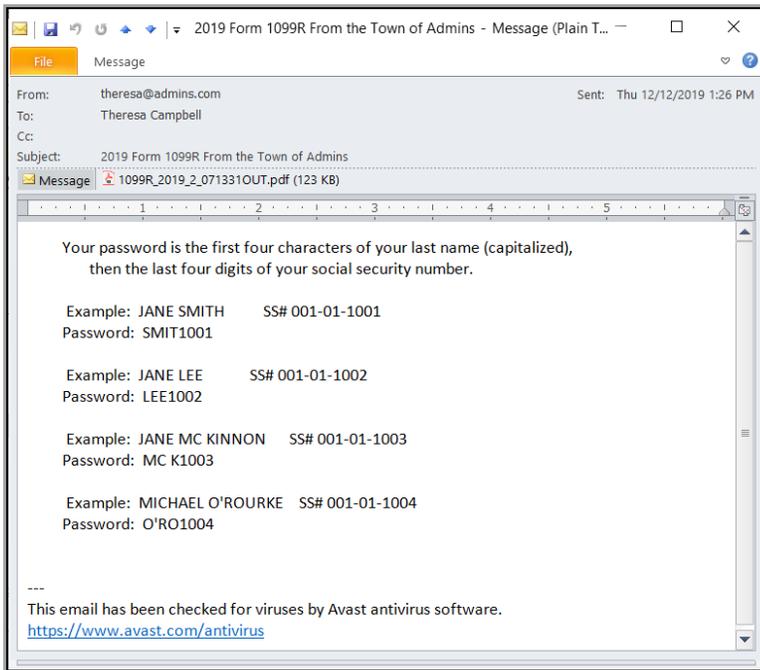
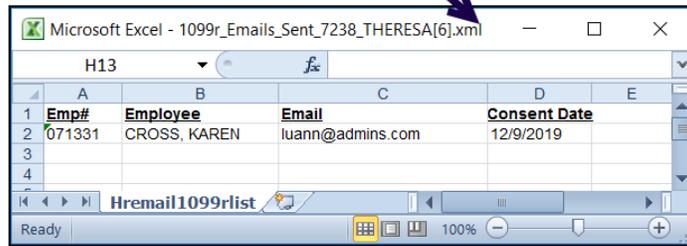
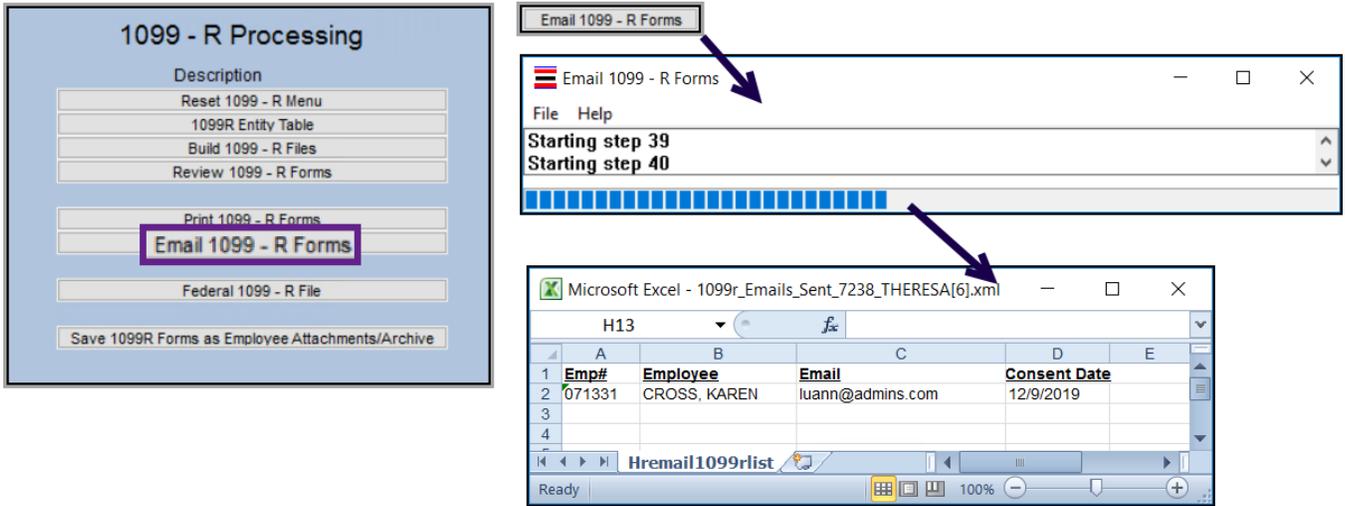
Both printed and emailed forms will be available as attachments after running the final step in the menu:

Save 1099R Forms as Employee Attachments/Archive



### 8.1.4 1099R Processing Steps Menu Email 1099R Forms Step [New]

There is a new **[Email 1099–R Forms]** button on the screen. This step will send emails to consenting employees and create an **Excel®** report listing the employee number, name, email, and date consent was received.



The email sent to the employee will have an encrypted, password protected **PDF®** attachment of the **1099–R** Form.

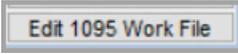
The email will be similar to the one sent out for Direct Deposit advice with payroll. The subject of the email will be **“2019 Form 1099–R from the Town of \* ”** (the Town of \* will be replaced with the community name as defined in Module Control #2).

The body of the email will give instructions on how to open the encrypted, password protected **PDF®** attachment.

[ADM-AUC-HR-10169]



### 8.1.5 1095C Processing Steps Menu Edit 1095C Work File Step [Enhancement]



**2019 Edit 1095 Work File**

Employee# **20031** 1 Name of Employee **KEITH S. BUSSEY** 2 SS# **000-00-1016** Reporting Entity **1 Report Bargaining Unit**

3 Street Address **395 CREEK STREET** ACA Offer Start **01-Nov-1985**  
 4 City or Town **CAMBRIDGE** 5 State **MA** 6 Zipcode **02138-0000** ACA Reporting Start/End **01-Nov-1985**  
 7 Name of Employer **TOWN OF RINDING** 8 Employer ID (EIN) **041234567** ACA Full Time Start/End **01-Nov-1985 30-Nov-2000**  
 9 Street Address **219 LEKES WHPF** 10 Contact Phone **(617) 494-5100 x 2116** ACA Declined

11 City or Town **BOSTON** 12 State **MA** 13 Zipcode **02110-0000**

EMPLOYEE OFFER AND COVERAGE Plan Start Month **07**

14 Offer of Coverage	12 Mths	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
15 Employee Share	15												
16 Applicable Section													

COVERED INDIVIDUALS If Employer provided self-insured coverage, check the box

17 Name of Covered	(b) SS#	(c) DOB	(d) 12 Mth	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>PAULA BRETTEN</b>	<b>000-00-5046</b>	<b>01/01/1985</b>	<b>X</b>												

The [Edit 1099R Work File] screen will display a message identifying this 1099R as an emailed form and showing the email address to where it will be sent. This is a message only and not an editable field.

\*Note: Forms that are emailed will not be produced in the **Print 1099 - R Forms** step.

Both printed and emailed forms will be available as attachments after running the final step in the menu:



### 8.1.6 1095C Processing Steps Menu Email 1095C Forms Step [New]

There is a new [Email 1099-R Forms] button on the screen. This step will send emails to consenting employees and create an Excel® report listing the employee number, name, email, and date consent was received.

**1095 Processing**

Description

- Reset 1095 Menu
- Payroll W2 1095 - C
- ACA Filing Table
- Bargaining Unit - Affordable Care Act
- ACA 1095 Audit Report

Build 1095 File

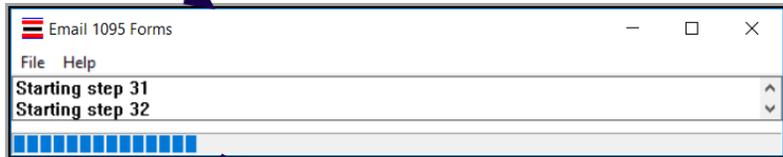
Edit 1095 Work File

Print 1095 Forms

**Email 1095 Forms**

Generate IRS Export File

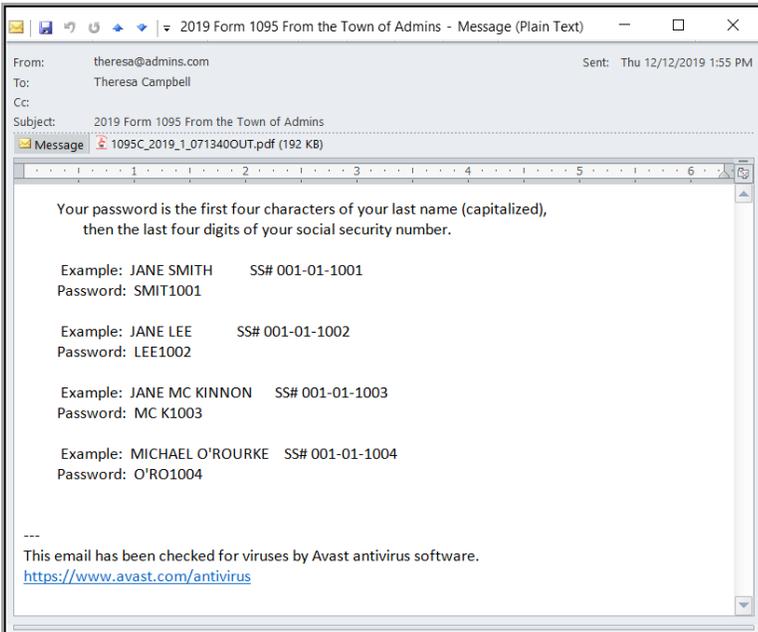
Save 1095 Forms as Employee Attachments/Archive



1095\_Emails\_Sent\_6721\_THERESA[3].xml - Microsoft Excel

Emp#	Employee	Email	Consent Date
000012	HOLMES, MARIE R	marie@admins.com	12/9/2019
000020	POWERS, LYNN M	lynn.m.powers@admins.com	12/9/2019
000031	BUSSEY, KEITH S	keithB@admins.com	12/1/2019
000087	PROVOST, KAREN A	kprovost@admins.com	12/10/2019
000205	DOUGLAS, MICHAEL R	Michael.R.Douglas@admins.com	12/10/2019
000286	MINCHILLO, MICHAEL J JR	MikeM@admins.com	12/10/2019
071340	PERRY, KEITH	PerryK@admins.com	4/1/2017
071341	DRAGON, MARIE	mdragon@admins.com	12/1/2019
071343	JONES, KAREN R	KarenJ@admins.com	12/9/2019

Hemail1095list



The email sent to the employee will have an encrypted, password protected **PDF**® attachment of the **1099-R** Form.

The email will be similar to the one sent out for Direct Deposit advice with payroll. The subject of the email will be **“2019 Form 1095 From the Town of Admins”** (the “Town of Admins” will be replaced with the community name as defined in Module Control #2).

The body of the email will give instructions on how to open the encrypted, password protected **PDF**® attachment.

[ADM-AUC-HR-10169]

## 8.2 ACA Forms

Minor changes were made to the face of the form to match the IRS specimen document. The employee names in Part I now require a line between the first name, middle initial and last name. This was likely due to a high incidence of name and social security mismatches in prior years.



Figure 21 Before -109C Part 1 Employee Name format - After – Employee Name format

A similar change was made to the name formats for covered individuals on Part III.

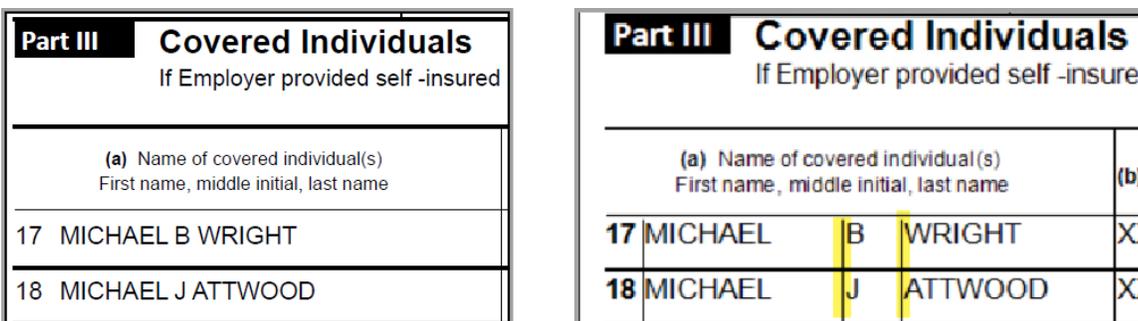


Figure 22 Before -109C Part III Name format - After –Name format

In addition, wording changes were made to the backer of the form in the 2<sup>nd</sup> and 3<sup>rd</sup> paragraphs of the Instructions for Recipient and the caution paragraph was removed from the instructions for Part I.

[ADM-AUC-SY-8124]



### 8.3 ACA Filing Table [Reminder]

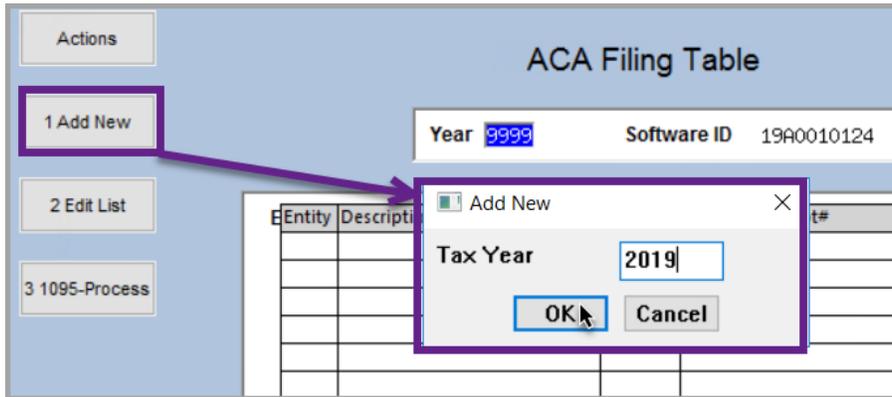
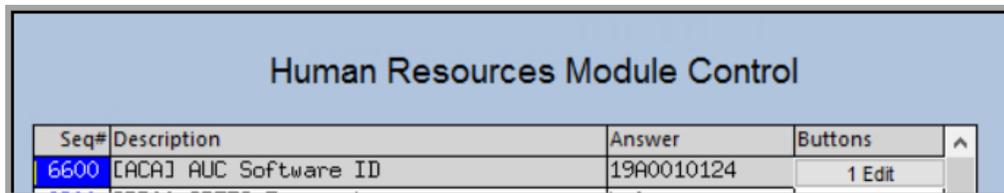


Figure 23 Calendar Year 2019 ACA Filing table

Select **Human Resources** ►  
**Tables** ► **ACA Filing Table**.

Click on **[1 Add New]** to create a record for calendar year 2019. Enter 2019 and click on **[OK]**.

If the **Software ID** is *not* **19A0010124** as shown, contact [support@admins.com](mailto:support@admins.com). The value is set in module control #6600.



[ADM-AUC-HR-10162]

### 8.4 [Build 1095 File] ► Selecting on Entity [Enhancement]

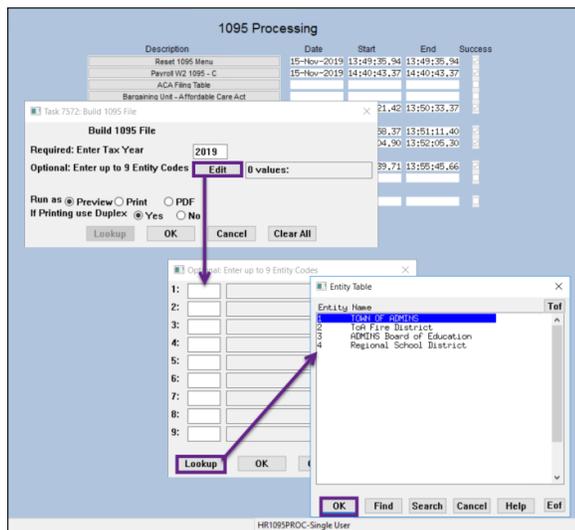


Figure 24 New selection on Entity on the Build 1095 File step

Some sites run a **1095C** process for each entity within the town (for example, if there are distinct Tax Information Numbers (TINs) for entities within the town, such as a Regional School District, a Day Care Center, a Board Of Education, and the Town).

The 1095C menu process is set up for individual users, such that a single entity may be selected when building the work file.

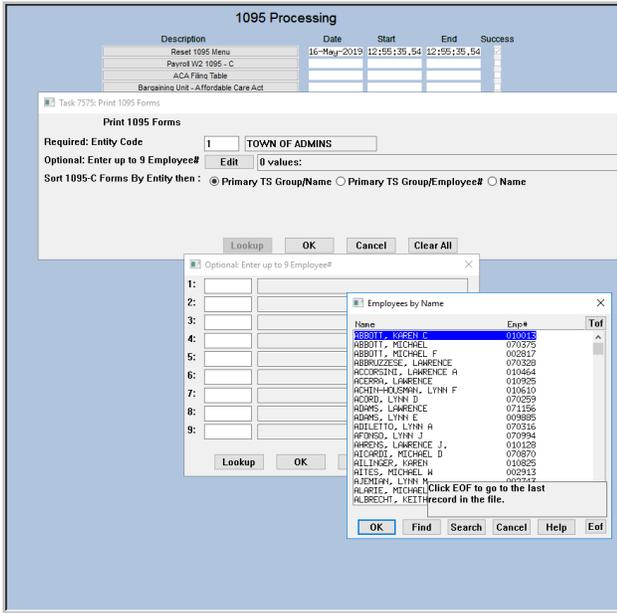
***Only Municipalities with multiple entities should fill in the Optional Entity codes.***

All other sites should leave this blank. If a municipality has multiple entities – it will select all the correct employees from all entities for this process.

[ADM-AUC-HR-10097]



## 8.5 Printing Forms [Enhancement]



The lookup on employees by name was improved to reduce the size of the dataset and make it easier use the lookup to find an employee. The lookup was restructured with columns to make it easier to see the names and now includes the **Entity** for each employee.

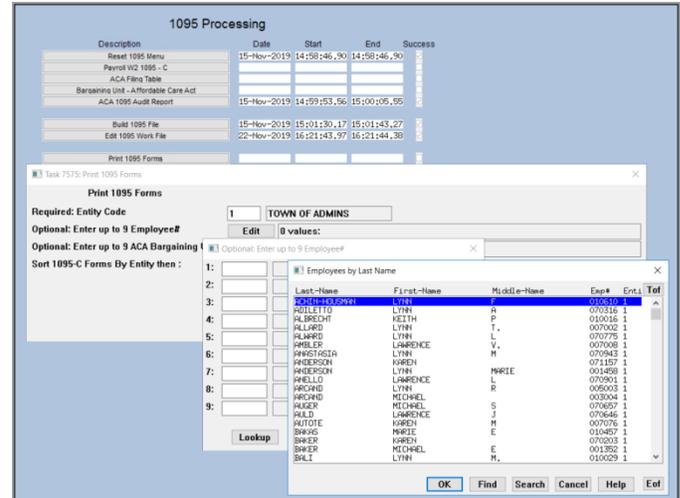


Figure 25 Print 1095 Forms Before &

After – lookup enhanced

[ADM-AUC-HR-10129]

## 8.6 1095C Printing by Bargaining Unit [Enhancement]

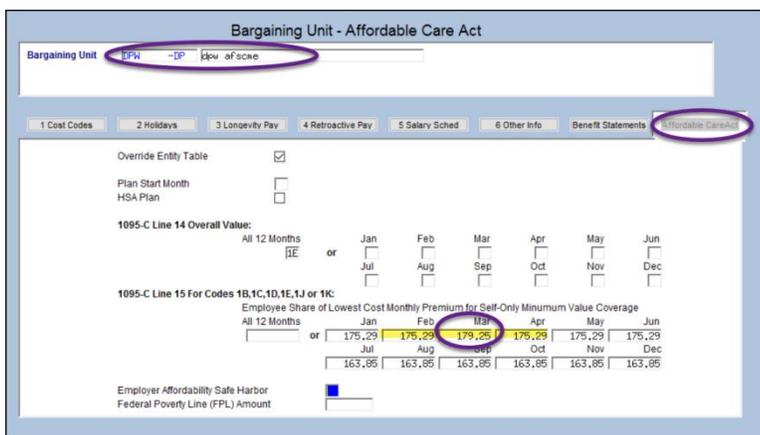
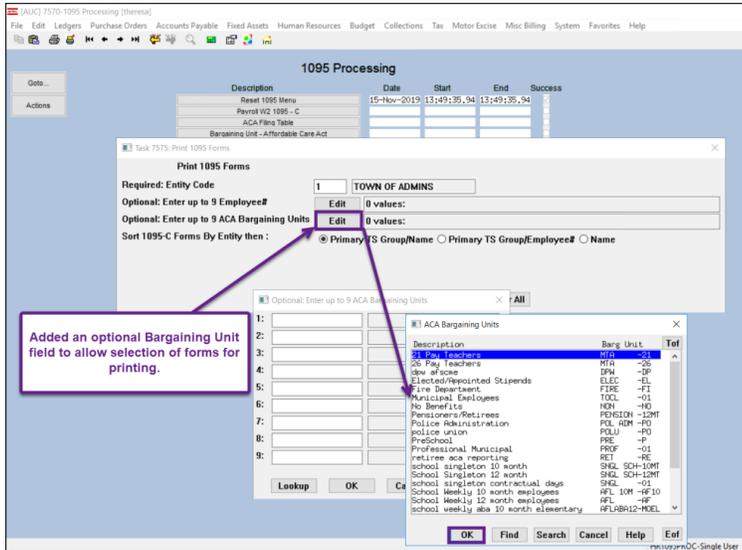


Figure 26 Affordable Care Act tab of the Bargaining Unit Table

If a typographical error is discovered after the initial printing of **1095C** forms, make the correction on the **Bargaining Unit –Affordable Care Act** tab and reprint the forms for the bargaining unit.

For example, **Figure 26** shows a bargaining unit with a transposition error in the dollar amount for March. When this error is discovered, make the correction on the table. Then reprint the affected forms as shown in **Figure 27**.



**ADMINS** added an optional selection on **Bargaining Unit** when printing **1095C** forms.

Now it is easy to reprint only the forms for the affected bargaining unit.

Figure 27 [Print 1095 Forms] optional selection on ACA Bargaining Unit

[ADM-AUC-HR-10077]

## 9 HELP REFERENCE LIBRARY

The following new or updated documents were added to the Help Reference Library.

### 9.1 New or Updated Documents

- SYSTEM HR-1110 System Administration Kit [Updated]
- SPECIAL PROCESSING HR-575 Email Tax Forms to Employees (W2, 2099R, 1095C) [New]
- YEAR END PROCESSING HR-630 W2 Year End Training Slides [Updated]
- HR-640 IRS Instructions for Forms W-2 and W-3 [Updated]
- HR-645 IRS Pub 15 (Circular E), Employer's Tax Guide [New]
- HR-660 IRS Instructions for Forms 1099-R and 5498 [Updated]
- HR-670 1099-R Slides [Updated]