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ACA Guide

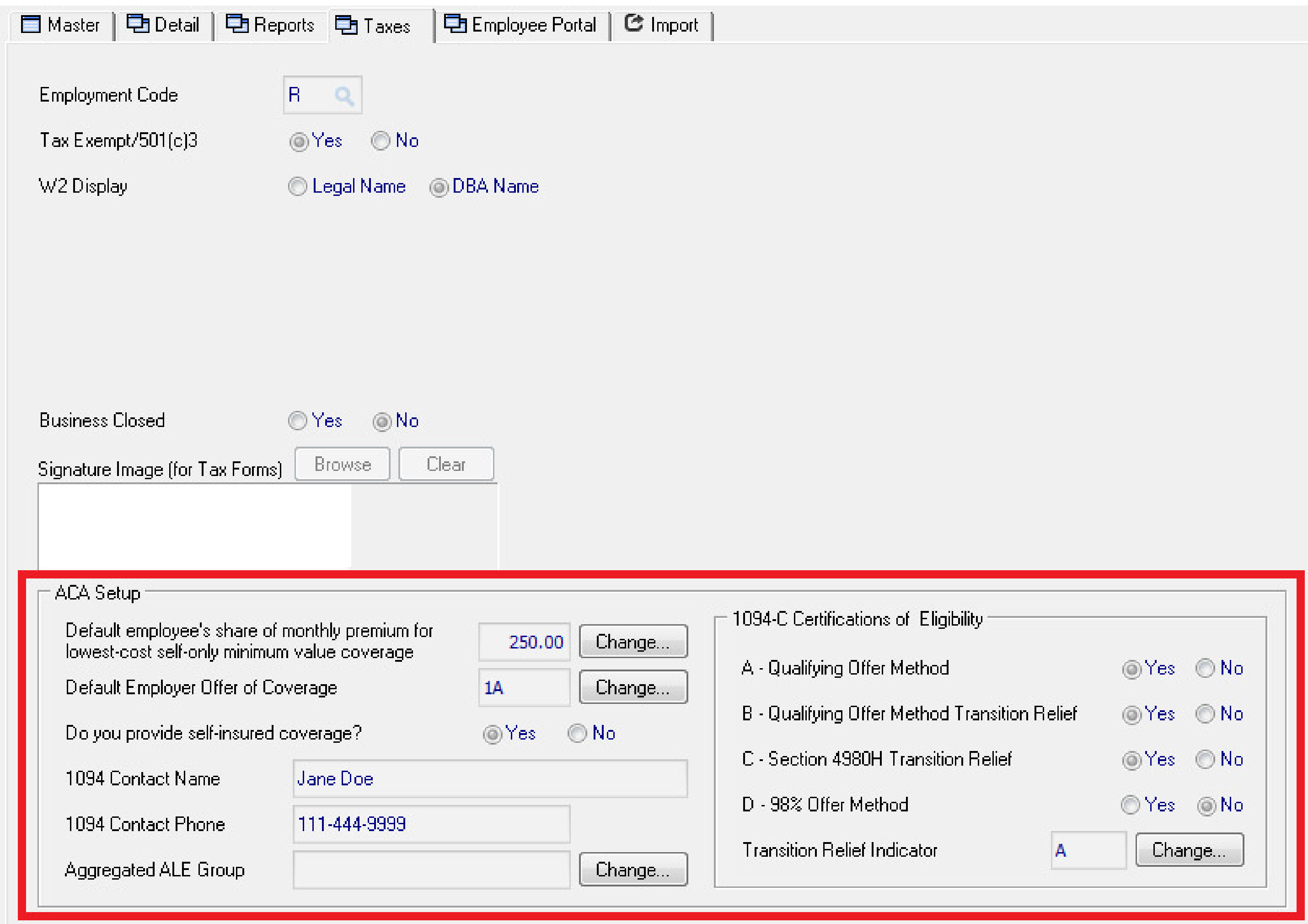
Updated: March 15, 2016

ACA Company Setup

There are several fields in **Module Master** (under General Setup in Company File Maintenance) that will help you set up default information that can be used for employee ACA setup. This information can then be used to speed up the employee setup process, and it can be changed for each employee if it does not apply to them. **Important: Each facility needs to be set up separately.**

Company defaults for the 1094-C form are also set up here.

In **Module Master** select the facility from the list, and then select the **Taxes** tab at the top. There you will see a section called **ACA Setup**.

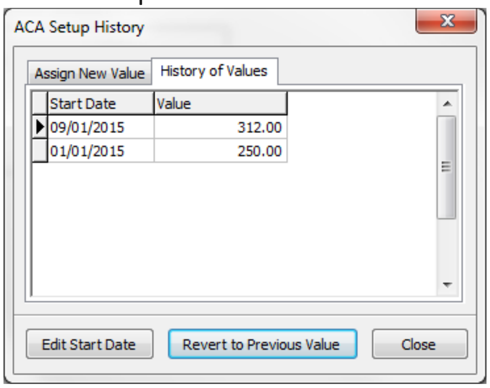


In this section you will need to set up the following items:

1. ‘**Default employee’s share of monthly premium for lowest-cost self-only minimum value coverage**’ is where you set up a default amount that applies to all employees. If your company does not have one

default rate for a plan that is offered to all employees, you can set up the most common rate here that would apply. To set it up simply click the **Change…** button to the right of it, specify a 'State Date' for when this rate should start to apply, and then type in the dollar amount in the 'Value' box and click **OK**. Every time this rate changes for the employee you will need to repeat this process with a new start date.

You can click the 'History of Values' tab in Change mode to view all of the start dates and rates that you have set up. Each rate is valid from its start date until the day that precedes the next start date.



Important: The rates must be set up in chronological order. Otherwise, you will have to remove all rate records (by using the **Revert to Previous Value** button at the bottom) and start over. Please contact Client Support if you need assistance with this process.

2. '**Default Employer Offer of Coverage**' is where you would specify the offer of coverage that would apply to most full-time employees who will get a 1095-C form. The setup is the same as for item #1 above, except that for the 'Value' you will select a code from the available options rather than typing it in.

3. '**Do you provide self-insured coverage?**' is where you would specify if your company is self-insured and provides that coverage to the employees. In order to change that option to 'Yes' you will need to be in Edit mode. You will need to click **Edit** on the right side of the screen, reselect the **Taxes** tab, change this field to 'Yes' and then click **Accept** on the right.

4. **'1094 Contact Name'** is where you would identify the name of the contact that you would like listed on your company's 1094-C form. You will need to click **Edit** on the right side of the screen, reselect the **Taxes** tab, enter the value for this field and then click **Accept** on the right.

5. **'1094 Contact Phone'** is where you would identify the phone number for the contact that you would like listed on your company's 1094-C form. You will need to click **Edit** on the right side of the screen, reselect the **Taxes** tab, enter the value for this field and then click **Accept** on the right.

6. **'Aggregated ALE Group'** is where you would select the ALE Group (if applicable) for the facility. The setup is the same as for item #1 above, except that for the 'Value' you will select an item from the

available options rather than typing it in. To set up ALE Groups so that they show up in available options here please see the **Setting Up ALE Groups** section on page 5.

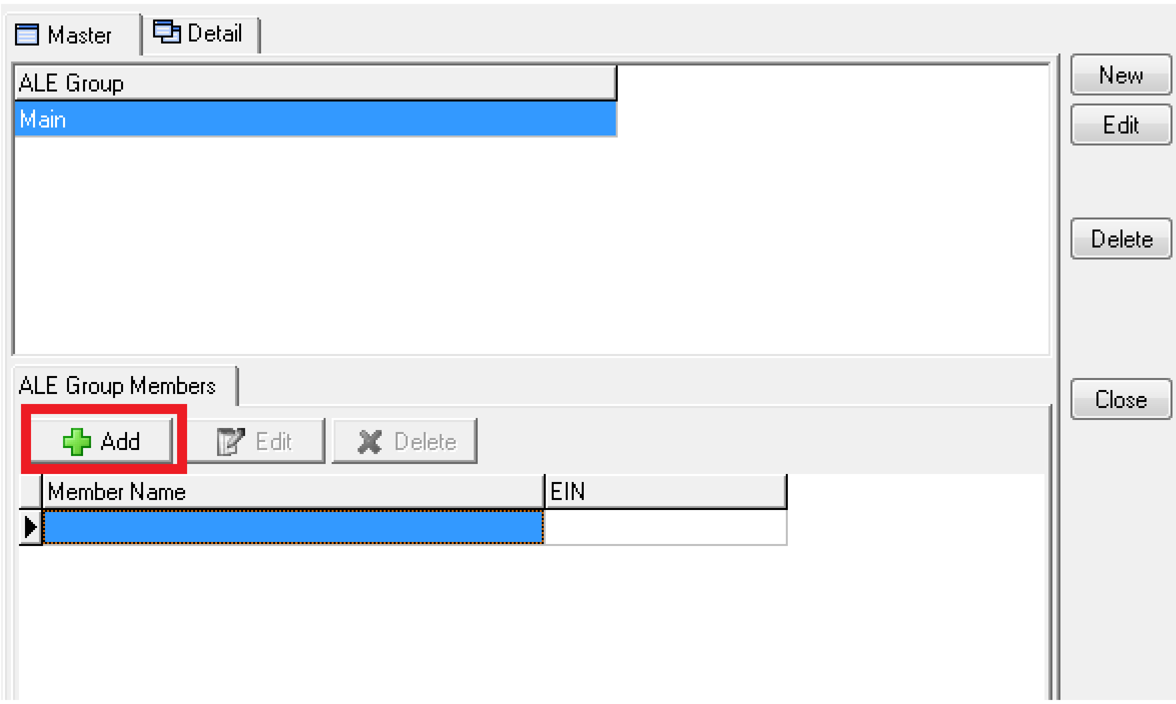
7. **'1094-C Certifications of Eligibility'** – in this section you will identify which Certifications of Eligibility you would like identified on your 1094-C form. In order to change any of these options to 'Yes' you will need to be in Edit mode. You will need to click **Edit** on the right side of the screen, reselect the **Taxes** tab, change the desire field(s) to 'Yes' and then click **Accept** on the right.

   You will also indicate the **'Transition Relief Indicator,'** if any, by specifying a start period and value by using the **Change…** option, as in item #1 above (you can not be in Edit mode to do this).

Setting Up ALE Groups

If you need to specify ALE Group members, you will need to access the **ALE Groups** item under General Setup in Company File Maintenance.

For each group that you need to set up, you will first click the **New** button on the right to add and name the group. You can then type in the name that you wish to assign to the group and click **Accept**. Your new group will now show up in the ALE Group section at the top of the screen.



In the bottom section of the screen click the **+Add** button to add each member of the group. You will see a pop-up box where you will list each member company's name and EIN. Repeat this process for all ALE members in the group.

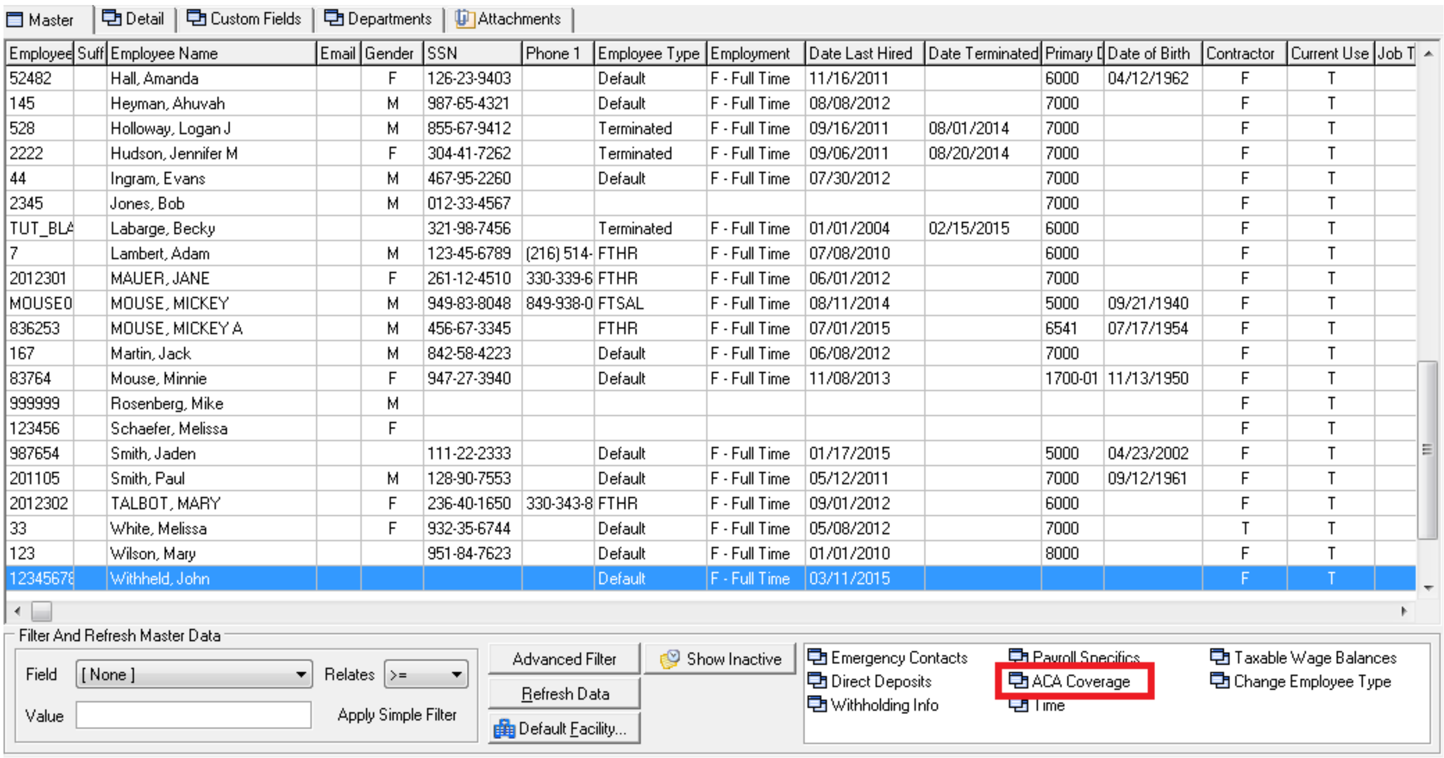
If you need to add a second group, you will need to click **New** at the top right of the screen again and repeat this process. Make sure that the correct group is selected at the top of the screen when you are adding members at the bottom.

ACA Employee Setup

1095C-Part II

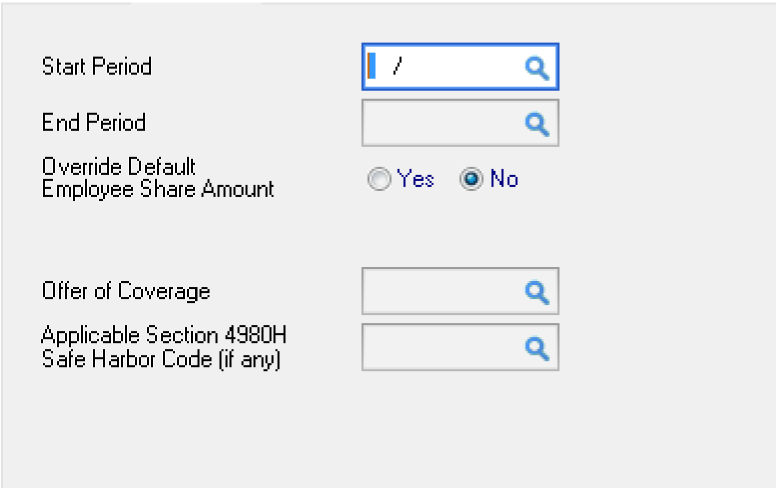
You will need to set up some information for all employees who will need a 1095C form. You do not need to complete this setup for any employee who will not be getting the form, but you may if you wish.

Select **Employees** (under Employee Setup in Company File Maintenance). At the bottom right of the screen is a box with links to several employee-specific setup items. There you will click **ACA Coverage** after selecting an employee from the employee list.



Employee	Suff	Employee Name	Email	Gender	SSN	Phone 1	Employee Type	Employment	Date Last Hired	Date Terminated	Primary D	Date of Birth	Contractor	Current Use	Job T
52482		Hall, Amanda		F	126-23-9403		Default	F - Full Time	11/16/2011		6000	04/12/1962	F	T	
145		Heyman, Ahuvah		M	987-65-4321		Default	F - Full Time	08/08/2012		7000		F	T	
528		Holloway, Logan J		M	855-67-9412		Terminated	F - Full Time	09/16/2011	08/01/2014	7000		F	T	
2222		Hudson, Jennifer M		F	304-41-7262		Terminated	F - Full Time	09/06/2011	08/20/2014	7000		F	T	
44		Ingram, Evans		M	467-95-2260		Default	F - Full Time	07/30/2012		7000		F	T	
2345		Jones, Bob		M	012-33-4567						7000		F	T	
TUT_BLA		Labarge, Becky			321-98-7456		Terminated	F - Full Time	01/01/2004	02/15/2015	6000		F	T	
7		Lambert, Adam		M	123-45-6789	(216) 514-	FTHR	F - Full Time	07/08/2010		6000		F	T	
2012301		MAUER, JANE		F	261-12-4510	330-339-6	FTHR	F - Full Time	06/01/2012		7000		F	T	
MOUSE0		MOUSE, MICKEY		M	949-83-8048	849-938-0	FTSAL	F - Full Time	08/11/2014		5000	09/21/1940	F	T	
836253		MOUSE, MICKEY A		M	456-67-3345		FTHR	F - Full Time	07/01/2015		6541	07/17/1954	F	T	
167		Martin, Jack		M	842-58-4223		Default	F - Full Time	06/08/2012		7000		F	T	
83764		Mouse, Minnie		F	947-27-3940		Default	F - Full Time	11/08/2013		1700-01	11/13/1950	F	T	
999999		Rosenberg, Mike		M									F	T	
123456		Schaefer, Melissa		F									F	T	
987654		Smith, Jaden			111-22-2333		Default	F - Full Time	01/17/2015		5000	04/23/2002	F	T	
201105		Smith, Paul		M	128-90-7553		Default	F - Full Time	05/12/2011		7000	09/12/1961	F	T	
2012302		TALBOT, MARY		F	236-40-1650	330-343-8	FTHR	F - Full Time	09/01/2012		6000		F	T	
33		White, Melissa		F	932-35-6744		Default	F - Full Time	05/08/2012		7000		T	T	
123		Wilson, Mary			951-84-7623		Default	F - Full Time	01/01/2010		8000		F	T	
12345678		Withheld, John					Default	F - Full Time	03/11/2015				F	T	

The **Master** tab on this screen will show the employee details that will apply to Part II of their 1095C form. In order to add a new record for the employee, click **New** on the right side of the screen.



Here you will create a new record for the employee to indicate their coverage. Any time that any of the information changes, you will need to add another record for the employee. The fields that must be set up include:

1. **Start Period** (required) - month to indicate the start period of the record.

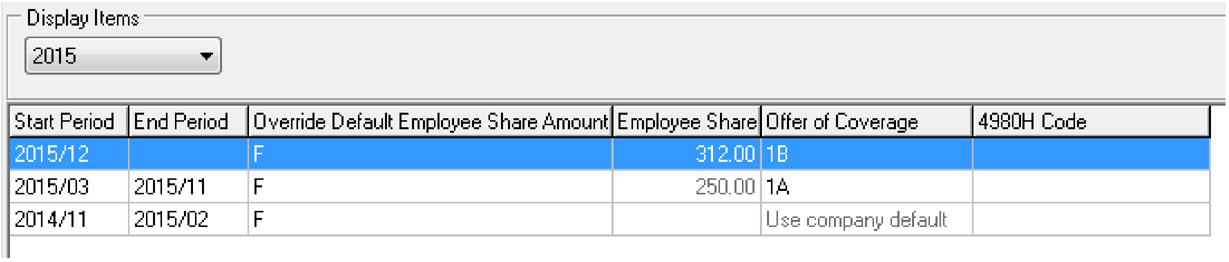
2. **End Period** (not required) – month to indicate when the record ended. This can be left blank if the record is still current. Also, when a new record is added with a subsequent start period, the 'End Period' will automatically be filled in for the last active record as the month prior to the new start period. The 'End Period' should be entered manually if the employee is no longer with the company and will not have a subsequent record in the system.

3. **Override Default Employee Share Amount** ('No' by default)- if the amount in **Module Master** set up as the default employee share applies to this employee, leave this option as 'No.' Otherwise, change it to 'Yes.' If you change to 'Yes' another field will show up called '**Employee's share of monthly premium for lowest-cost self-only minimum value coverage**' and you will be able to specify the amount that applies to this employee.

4. **Offer of Coverage** (not required) - if the offer of coverage for this employee differs from **Module Master** default, then specify the code that applies to this employee. Otherwise leave blank.

5. **4980H Code** (not required) - enter the Section 4980H Safe Harbor code if one applies to this employee. The system provides a list of valid codes.

Once the record is complete, click the **Accept** button on the right side of the screen. You may then click **New** again to start another record, if applicable. Below is an example of the **Master** screen with several setup records for an employee.



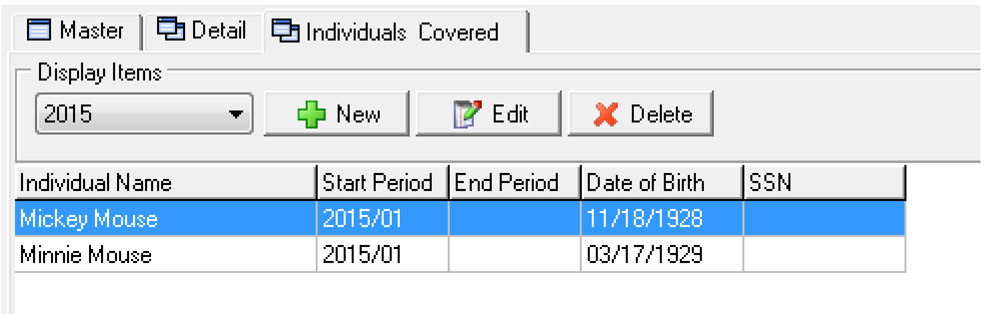
Start Period	End Period	Override Default Employee Share Amount	Employee Share	Offer of Coverage	4980H Code
2015/12		F	312.00	1B	
2015/03	2015/11	F	250.00	1A	
2014/11	2015/02	F		Use company default	

You can use the year filter at the top of the **Master** screen under 'Display Items' to narrow down the list of active records to a specific year.

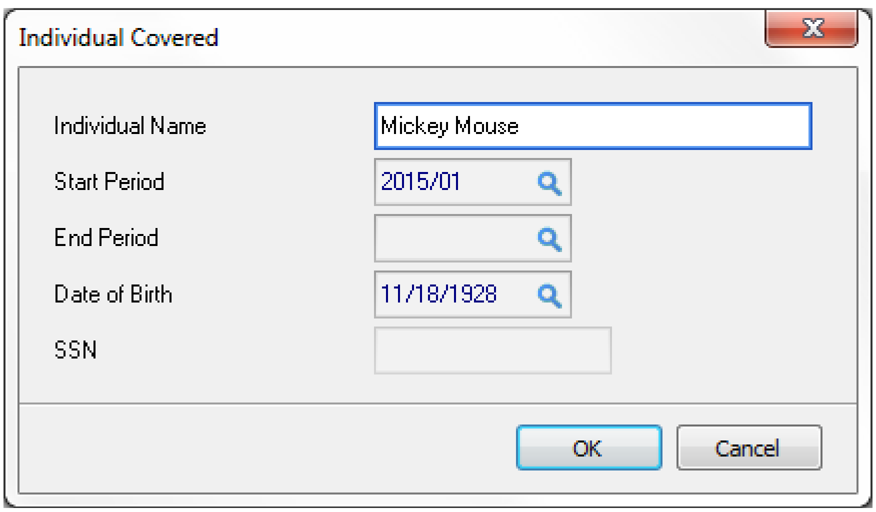
You can review the information set up for the employees here by pulling up a report called **1095C Part II Report,** which can be found under Tax Reports and Forms.

1095 C-Part III

If you indicated in **Module Master** that you provide self-insured coverage, then you will have an additional tab that shows up in **ACA Setup** for each employee called **Individuals Covered**. Here you will have to indicate information for the individuals that were covered under that employee's plan.



To add each individual's record click + **New** at the top of the screen (NOT on the right). You will then see a popup box that asks for the individual's information. **Name**, **Start Period** and either **Date of Birth** or **SSN** are required. You only need to enter **End Period** if the individual is no longer covered on the plan, otherwise the system will assume that they have active coverage for all months since their last start period.

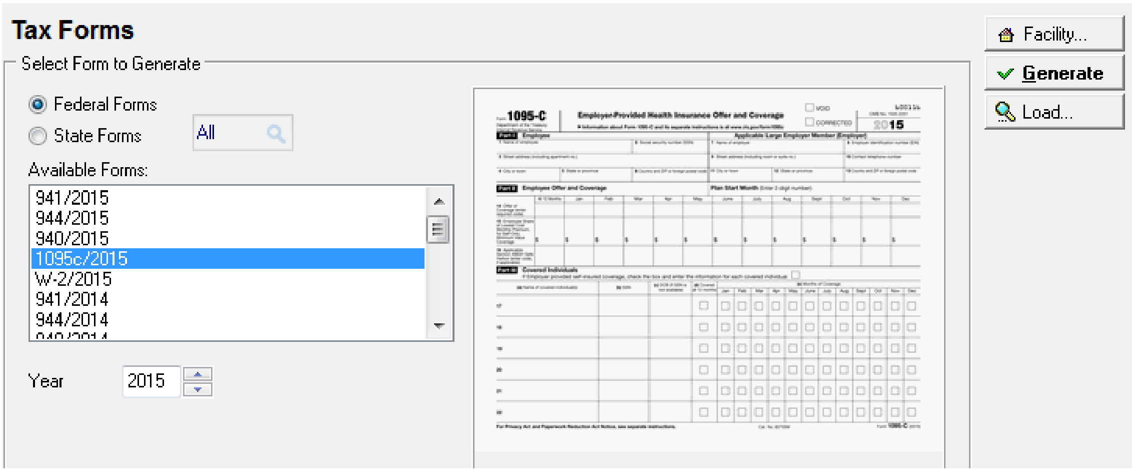


If you make a mistake, you can use the **Edit** button at the top to make changes to any record, or the **Delete** button to delete a record. **Important: Please be careful when spelling individual names, since two names spelled slightly differently are treated as different individuals by the system**. The same applies to two individuals with the same name-the system does not allow two records with the same name to apply to the same period, so if two individuals have the same name you will need to differentiate them with a middle initial, a suffix, etc.

The year filter at the top of this tab works the same way as the year filter on the **Master** tab.

Generating 1095-C/1094-C Forms

To generate 1095-C and 1094-C forms go to the **Tax Forms** menu item under Tax Reports and Forms. Under Available forms select **1095c/2015**, specify the year for which the forms needs to be generated underneath, and click the **Generate** button on the right. (Once you have generated the forms for a given year, you can use the **Load…** button to access the forms as they were last saved.)



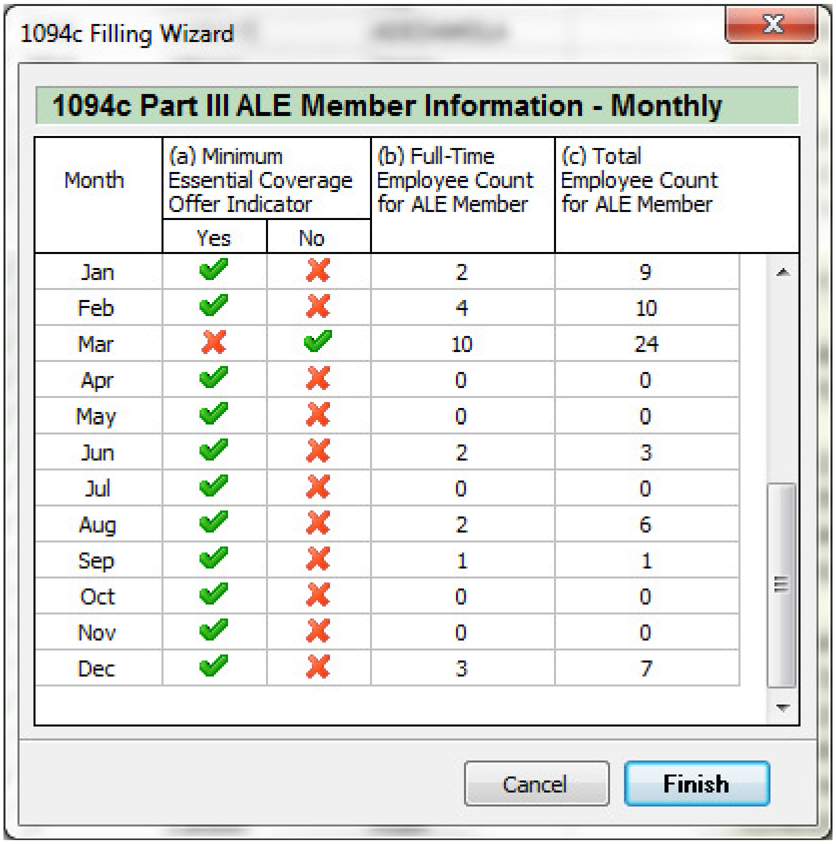
On the next screen you will see a list of your employees. Full-time employees (worked 130 or more hours in at least one month and received pay in the selected year), as well as any other employees who have covered individuals identified, will be automatically selected by the system with a green check mark. Employees who do not meet that criteria will have a red X next to their name. Only selected employees will have a 1095-C form generated.

Step 1: Select Employees Prior Step Next Step Save

Select	Emp ID	Last Name	First Name	Middle Initial	SSN	Date Hired
✔	100001	Abr	Yared		347-94-7373	05/07/2014
✔	1	Aiken	Clay	R	621-42-3074	02/15/2007
✔	5440	AJIBOYE	ADEDAMOLA		037-70-5698	07/01/2011
✔	5516	Alfonso	Jeremy		930-91-9366	03/15/2010
✘	acb	asd	asd			03/13/2015
✘	0824	BANKS	BENNY	Q	123-45-6788	07/01/2011
✔	test	Bday	Ni		111-22-3333	01/01/2011
✔	23	Brown	Sally		052-35-7964	06/03/2012
✘	5490	CAMPBELL	ELIANA			04/27/2010
✔	CAR4496	CARMESTRO	ELLEN		111-11-1111	01/01/2013
✘	#1	DAngelo	Nick			
✔	4	Dewyze	Lee	R	621-74-0865	06/28/2010
✔	3	Doe	Jane	J	724-36-1522	01/01/2008
✔	01	Doe	John			01/01/2014
✔	ECK4759	ECKERT	PAUL		222-22-2222	01/01/2013
✔	67	Gretzky	Wayne		478-53-2567	07/01/2012
✔	52482	Hall	Amanda		126-23-9403	11/16/2011
✘	145	Heyman	Ahuvah		987-65-4321	08/08/2012
✘	%	hi	hi			09/01/2014
✘	528	Holloway	Logan	J	855-67-9412	09/16/2011

You can manually select and deselect additional employees by double-clicking on the check mark or X.

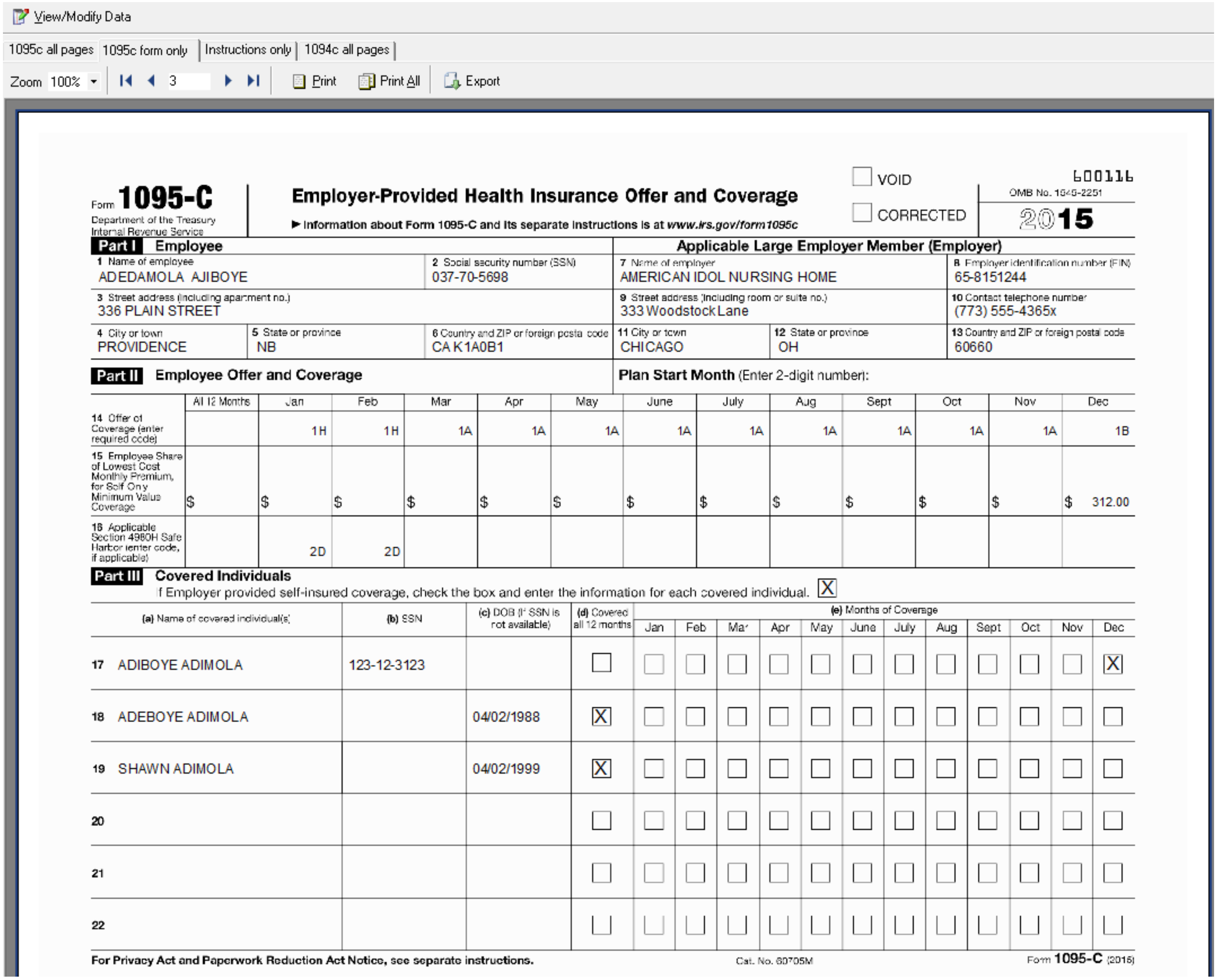
Once you have finalized your employee selection, click **Next Step** at the top of the screen. You will get a pop-up window with certain 1094-C Part III information for your review.



Month	(a) Minimum Essential Coverage Offer Indicator		(b) Full-Time Employee Count for ALE Member	(c) Total Employee Count for ALE Member
	Yes	No		
Jan	✔	✘	2	9
Feb	✔	✘	4	10
Mar	✘	✔	10	24
Apr	✔	✘	0	0
May	✔	✘	0	0
Jun	✔	✘	2	3
Jul	✔	✘	0	0
Aug	✔	✘	2	6
Sep	✔	✘	1	1
Oct	✔	✘	0	0
Nov	✔	✘	0	0
Dec	✔	✘	3	7

The system will preselect certain options based on the information that is identified in your employee ACA setup. You have the option to make changes to the items in this window. You can change the check mark or X from column (a) by double-clicking on each, and you can overtype the figures in columns (b) and (c). Once you have finalized these selections, click **Finish** at the bottom.

You will now see all of the 1095-C and 1094-C forms generated. You can click **View/Modify Data** at the top to return to the employee selection screen, if you wish to make any changes.



View/Modify Data

1095c all pages | 1095c form only | Instructions only | 1094c all pages

Zoom 100% | 3 | Print | Print All | Export

600116

Form **1095-C** Department of the Treasury Internal Revenue Service

Employer-Provided Health Insurance Offer and Coverage

► Information about Form 1095-C and its separate instructions is at *www.irs.gov/form1095c*

VOID

CORRECTED

OMB No. 1545-2251

2015

Part I Employee | **Applicable Large Employer Member (Employer)**

1 Name of employee: ADEDAMOLA AJIBOYE	2 Social security number (SSN): 037-70-5698	7 Name of employer: AMERICAN IDOL NURSING HOME	8 Employer identification number (EIN): 65-8151244
3 Street address (including apartment no.): 336 PLAIN STREET		9 Street address (including room or suite no.): 333 Woodstock Lane	10 Contact telephone number: (773) 555-4365x
4 City or town: PROVIDENCE; 5 State or province: NB	6 Country and ZIP or foreign postal code: CA K1A0B1	11 City or town: CHICAGO; 12 State or province: OH	13 Country and ZIP or foreign postal code: 60660

Part II Employee Offer and Coverage | **Plan Start Month** (Enter 2-digit number):

	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
14 Offer of Coverage (enter required code)		1H	1H	1A	1A	1A	1A	1A	1A	1A	1A	1A	1B
15 Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage	$	$	$	$	$	$	$	$	$	$	$	$	$ 312.00
16 Applicable Section 4980H Safe Harbor (enter code, if applicable)		2D	2D										

Part III Covered Individuals

If Employer provided self-insured coverage, check the box and enter the information for each covered individual. ☒

	(a) Name of covered individual(s)	(b) SSN	(c) DOB (if SSN is not available)	(d) Covered all 12 months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
17	ADIBOYE ADIMOLA	123-12-3123		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒
18	ADEBOYE ADIMOLA		04/02/1988	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
19	SHAWN ADIMOLA		04/02/1999	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
20				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
21				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
22				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 60705M Form **1095-C** (2015)

You will notice that there are several tabs at the top of the screen. The first one shows all pages of the 1095-C, which means the form itself and the instructions for the recipient. The second tab will show you only the forms, the third only the instructions, and the final tab will show the 1094-C form.

You can print the forms using the **Print** or **Print All** options at the top of the screen. You can also export them to various file formats using the **Export** option.

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