

ACA Workflow: Generate 1095s

For those not engaging the automated process: Upon approval of the final ACA Summary report(s) you are ready to generate your 1095-C Forms within the ACA Workflow.

1. Expand **Generate 1095s**
2. Click **Generate** and follow the prompts within the dialog window that appears.

The screenshot shows the 'Generate 1095s' section with a 'Pending' status. A message states: 'Now that you've approved your ACA Summary report, you are ready to generate your 1095-C forms. Simply click the Generate button and follow the prompts within the dialog window that appears. You will return to this screen once your 1095 forms start processing.' Below this, the 'ACA Summary EIN: 65-1354535' is displayed. A 'Generate' button is circled in red. Other details include: Generated: 8/20/2019 1:54:37 PM, Download link, Generated By: Charlie Brown, Parameters link, Qualified: 8/21/2019 9:25:37 AM, Approved: 8/21/2019 1:19:07 PM, and Qualified By: Linus Van Pelt, Approved By: Lucy Van Pelt.

3. Follow the prompts within the dialog window that appears.

The dialog window shows the following options:
Corrections Only: Generate only corrected forms.
Special Situations: Do not mask SSN on forms.
Include Address Page: I want to include the address page.
Filename Format: A dropdown menu is open, showing options: 'Group All in One PDF' (highlighted), 'Default (i.e., "LastName-FirstName-01")', 'Group By Location', and 'Group By ZIP Code'.



The standard distribution preference for 1095-C Forms generated is to group into a single PDF document by selecting **Group ALL in One PDF** from the dropdown menu. When selected, this option will compile all of 1095-C Forms within a single printer ready PDF document.

The Generate 1095s stage updates to the **Distributed** status.

The screenshot shows the 'Generate 1095s' section with a 'Distributed' status and a green checkmark. A message states: 'Your 1095 forms been successfully generated. You can click the Download link to review, print, and manually distribute. When you are ready, click the Continue button to begin the process of submitting AIR files to the IRS.' Below this, the '1095C Form Archive' is displayed with a 'Download' button circled in red. Other details include: Generated: 1/28/2019 1:23:14 PM, Generated By: Kelli Smith, and Recipients link. At the bottom right, there are 'Skip' and 'Continue' buttons.

All final 1095-C PDF reports should be generated within the ACA Workflow and will push a link to the Employer Dashboard to allow employers to download a copy for their records.

Page 3 of the Form 1095-C

As a reminder: Part III (Covered Individuals) is only completed on individuals who *elect the offer of coverage* **AND** the employer's medical plan is *self-funded*.

Form 1095-C (2020) 600320
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Part III Covered Individuals
If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee.

	(a) Name of covered individual(s) First name, middle initial, last name	(b) SSN or other TIN	(c) DOB (if SSN or other TIN is not available)	(d) Covered all 12 months	(e) Months of coverage												
					Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	
18	Suzy B Smith	222-22-2222		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	Truman K Smith	060-00-0066		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	Cathy C Smith	003-00-0300		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Once the Generate 1095s process has been completed, click **Continue**

Generate 1095s Distributed ✓

! Your 1095 forms been successfully generated. You can click the [Download](#) link to review, print, and manually distribute. When you are ready, click the [Continue](#) button to begin the process of submitting AIR files to the IRS.

1095C Form Archive Distributed ✓

Generated: 1/28/2019 1:23:14 PM [Download](#)

Generated By: Kelli Smith [Recipients](#)

Skip [Continue](#)

The next stage **Submit AIR** is performed only *AFTER* all 1095-C PDF files have been successfully distributed. This would include a file sent to the client directly or vendor for printing/mailing.

National Health Care LLC Reset Workflow

▶ Review and Approve Approved ✓

▶ Generate 1095s Distributed ✓

▼ **Submit AIR** Pending !

ACA Summary EIN: 36-1234567_regenerated Ready for Submission ✓

Generated: 6/1/2022 11:28:07 AM [Download](#)

Generated By: Kelli Smith [Parameters](#)

Qualified: 6/1/2022 11:31:14 AM **Approved:** 6/1/2022 11:31:40 AM

Qualified By: Kelli Smith **Approved By:** Kelli Smith Run and Submit