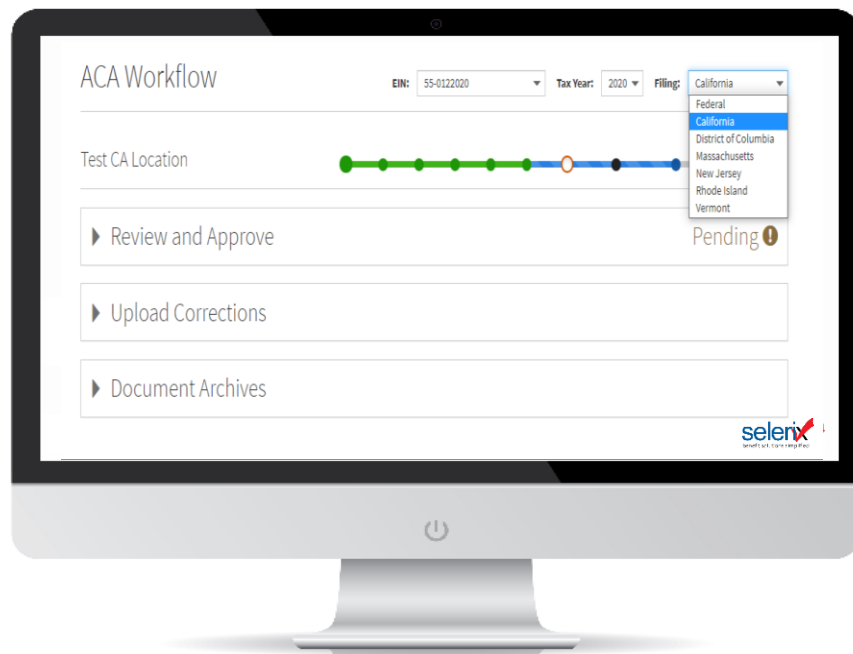




# Selerix ACA Workflow: State-Level Filing Guide



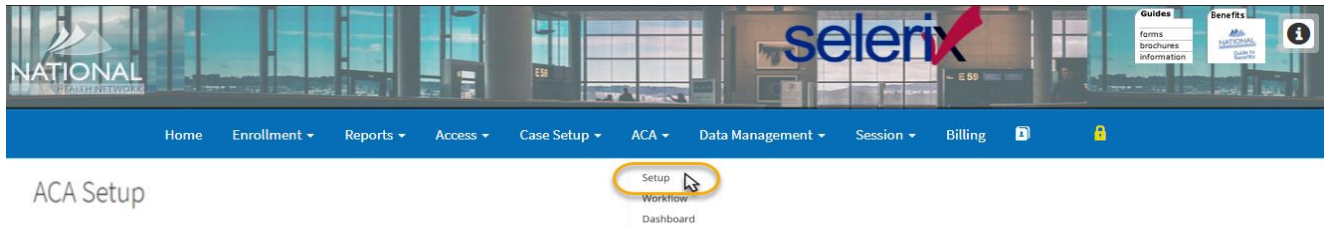
**State-Level Filing:** this additional phase formally begins the IRS forms and filing process. The services in this phase can vary depending on the number of unique EINs for any given client.

**Did You Know**

The ACA **Setup** screen allows you to add the additional ACA configuration elements for identifying locations that may be subject to specific state-level filing ACA reporting.

To access the **ACA Setup** Component

From the toolbar, hover over the **ACA** menu and click **Setup** as shown below:



**State Mapping:** *ACA Setup Enhancement – Effective January 2021*

Outlines any specific states subject to a separate State-Level filing requirement by unique EIN, if applicable. These indicators are integrated within the ACA Workflow process as part of the new State-Level filing process. *Please note: not all employers are subject to separate State-Level filing requirements.*

State Mapping

Company	EIN	Entity Type	States
Test CA Location	550122020	Location	CA
Test RI Location			
TestNevada Location			

**State Selection**

To add states, search or select an option below. Use the search field to narrow results.

Search:

<input type="checkbox"/> Alabama	<input type="checkbox"/> Alaska	<input type="checkbox"/> Arizona
<input type="checkbox"/> Arkansas	<input checked="" type="checkbox"/> California	<input type="checkbox"/> Colorado
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Delaware	<input type="checkbox"/> District of Columbia
<input type="checkbox"/> Florida	<input type="checkbox"/> Georgia	<input type="checkbox"/> Hawaii
<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois	<input type="checkbox"/> Indiana
<input type="checkbox"/> Iowa	<input type="checkbox"/> Kansas	<input type="checkbox"/> Kentucky
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maine	<input type="checkbox"/> Maryland
<input type="checkbox"/> Massachusetts	<input type="checkbox"/> Michigan	<input type="checkbox"/> Minnesota
<input type="checkbox"/> Mississippi	<input type="checkbox"/> Missouri	<input type="checkbox"/> Montana
<input type="checkbox"/> Nebraska	<input type="checkbox"/> Nevada	<input type="checkbox"/> New Hampshire
<input type="checkbox"/> New Jersey	<input type="checkbox"/> New Mexico	<input type="checkbox"/> New York
<input type="checkbox"/> North Carolina	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Ohio
<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Oregon	<input type="checkbox"/> Pennsylvania
<input type="checkbox"/> Rhode Island	<input type="checkbox"/> South Carolina	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Tennessee	<input type="checkbox"/> Texas	<input type="checkbox"/> Utah
<input type="checkbox"/> Vermont	<input type="checkbox"/> Virginia	<input type="checkbox"/> Washington
<input type="checkbox"/> West Virginia	<input type="checkbox"/> Wisconsin	<input type="checkbox"/> Wyoming

Select All

## Guide to the ACA Workflow

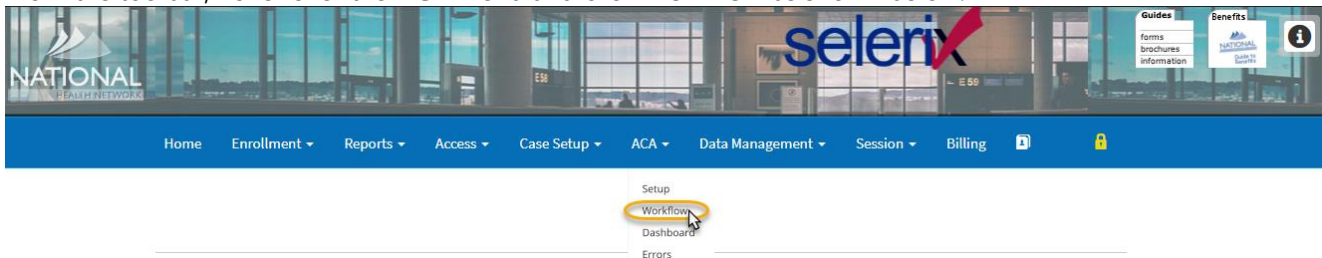
### Generate the Final ACA Summary report(s) using AIR Submission within ACA Workflow

The final ACA Summary process allows the employer to review the data contained within the report specifically focusing on the data found under Lines 14, 15 and 16, which represents Part II of the 1095-C Form provided to employees. The information produced on the final ACA Summary is what will be populated on the 1095-C Form.

Verifying the ACA Setup and Summary Parameters are accurate is the key to ensuring the report runs accurately. This information should be provided by the employer and maintained on file. The ACA Summary report is an Excel spreadsheet containing five unique tabs: Statistical, 1095-C, 1094-C, Code Key and Warnings tab which identifies any errors. Warnings identified on the Warnings Tab should be addressed with the employer and the applicable updates/corrections completed to clear the warning(s).

### To access the ACA Workflow

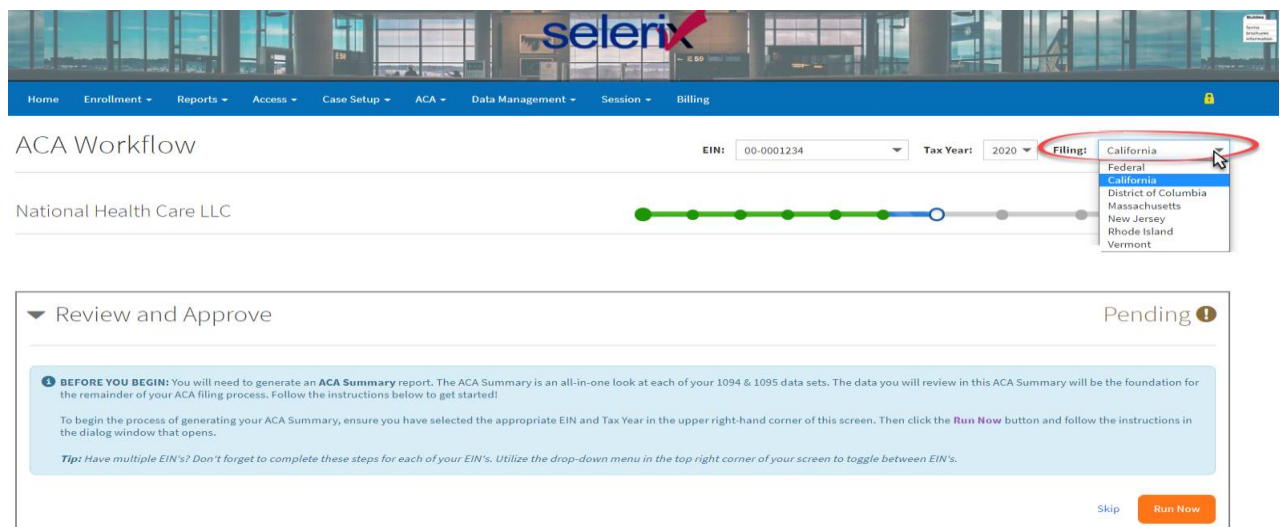
From the toolbar, hover over the **ACA** menu and click **Workflow** as shown below:



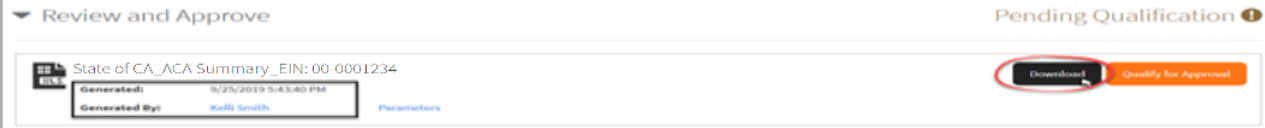

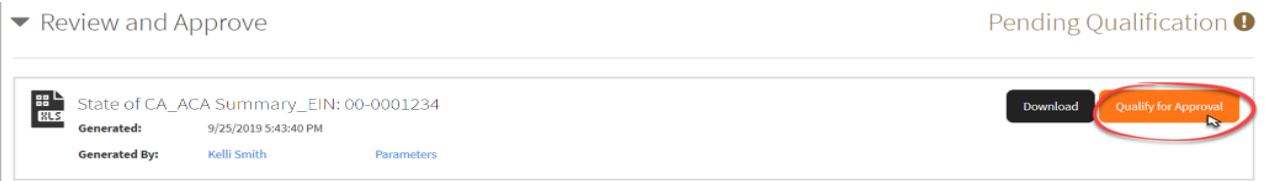
### ACA Workflow Enhancement – Effective January 2021: State-Level Indicator

The **ACA Workflow** landing page will display and allow you to select the unique EIN and the specific state-level filing process you which to begin. The following steps should be completed:

1. Elect the unique **EIN**, if multiple
2. Select State using the **Filing** drop-down option
3. Expand **Review and Approve**
4. Click **“Run Now”**



<h2 style="text-align: center;">Generating State-level ACA Summary Report within the workflow</h2>	
	<p>The ACA Workflow State-Level Indicator is integrated with custom parameters to isolate only those employees within the specific state selected under the employee’s home address. The workflow creates the specific state-level ACA Summary report required for submitting the necessary data electronically as part of the state-level filing process.</p> <p>The following steps will guide you through the process of:</p> <ol style="list-style-type: none"> <li>1. Generating the state-level only ACA Summary Report(s)</li> <li>2. Qualifying for Employer Approval</li> <li>3. Obtaining employer Approval for Submission Approve</li> <li>4. Submitting your state-level filing request to ACA Support</li> <li>5. Managing the state-level filing responses and feedback, if applicable</li> <li>6. Managing the state-level Transmission Confirmation</li> </ol>
<h3>Step</h3>	<h3>ACA Workflow: Complete ACA Summary Parameters</h3>
<p>1.</p>	<p>You will be prompted with a pop-up to complete the required report parameter information. Report Parameters are completed with information provided by the employer for each unique EIN. <b>If the employer is filing multiple EIN's, repeat this process for each EIN.</b></p> <div data-bbox="240 892 1344 1312" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>ACA Summary 2020</b></p> <p>This is the authoritative transmittal for this ALE Member: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>This ALE Member is a member of an Aggregated ALE Group: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Certifications of Eligibility</p> <p><input type="checkbox"/> Qualifying Offer Method <input type="checkbox"/> 98% Offer Method</p> <p>Affordability Method</p> <p><input type="checkbox"/> Federal Poverty Level (FPL) <input type="checkbox"/> Rate of Pay Based on Hourly Wage</p> <p><input type="checkbox"/> Rate of Pay Based on Pay History <input type="checkbox"/> W2 Earnings</p> <p><input type="checkbox"/> Rate of Pay Based on Annual Salary</p> <p>Special Situations</p> <p><input type="checkbox"/> Include offers made to part-time employees <input type="checkbox"/> Include 1094B and 1095B data</p> </div> <p>Select applicable recipient(s) designated to receive, review and <b>Approve for Submission</b> the state-level ACA Summary report(s) as part of the <b>Qualify for Approval</b> process.</p> <div data-bbox="240 1449 1351 1743" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Recipients</p> <p><input checked="" type="checkbox"/> Charlie Brown (charlie.brown@peanuts.com) <input type="checkbox"/> Lucy Van Pelt (lucy.vanpelt@peanuts.com)</p> <p><input checked="" type="checkbox"/> Linus Van Pelt (linus.vanpelt@peanuts.com)</p> <div style="background-color: #007bff; color: white; padding: 5px; margin-top: 10px;"> <p> <b>The Summary Description</b> should include the following naming convention. (e.g. State of CA_Final ACA Summary_mm.dd.yy)</p> </div> <p style="text-align: right;"><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p>Once complete, click “<b>Confirm</b>” and the file will begin processing in real time as show on the indicator below:</p> <div data-bbox="240 1795 1351 1864" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>▼ Review and Approve <span style="float: right; color: #007bff;">Processing </span></p> </div>

<p><b>Step</b></p>	<p><b>ACA Workflow: State-Level ACA Summary Pending Qualification</b></p>
<p>2.</p>	<p>When the report has finished, you now have the ability to download the ACA Summary report for preliminary review of the data elements which includes the Warnings tab, 1095-C and 1094-C tabs.</p> <p><b>Did You Know</b> The date, time and user associated with generating the file is captured in the workflow</p> <p>Once the ACA Summary report generates, the following steps should be completed:</p> <ol style="list-style-type: none"> <li>1. Expand <b>Review and Approve</b></li> <li>2. Click "<b>Download</b>" to review the completed ACA Summary excel file</li> </ol>  <p>The <b>Qualify for Approval</b> process is designed to be completed by the ACA manager and serves as their preliminary data review confirmation and acknowledgement.</p>
<p><b>Step</b></p>	<p><b>ACA Workflow: Pending Qualification Preliminary ACA Summary Review</b></p>
<p>3.</p>	<p>Once the ACA Summary report download is completed the preliminary data elements review of the 1095-C and 1094-C tabs as well as any errors that might be identified under the Warnings tab should be performed.</p>  <p><b>Did You Know</b> Additional resources are available on the <b>Most Common Form Summary Warnings</b> and <b>FAQs on the 1095-C Form Reporting</b> which are located in the Appendix section of this guide.</p>
<p><b>Step</b></p>	<p><b>ACA Workflow: ACA Summary Qualify for Approval</b></p>
<p>4.</p>	<p><b>Did You Know</b> The <b>Qualify for Approval</b> process is designed to be completed by the ACA manager and confirms the preliminary data review process has been completed</p> <p>Once the ACA Summary preliminary data review is finalized the following step should be completed</p> <ol style="list-style-type: none"> <li>1. Click "<b>Qualify for Approval</b>" to provide the ACA Summary report to the employer for their electronic approval from the <b>ACA Dashboard</b>.</li> </ol> 

## ACA Workflow: ACA Summary Qualify for Approval (Cont.)

Once complete, a system generated email notification will be sent to the user who generated the report as well as the recipient(s) designated in the report parameters. This notification will direct the recipient(s) to the **ACA Dashboard** to review the data and **Approve for Submission**. See example notification below:



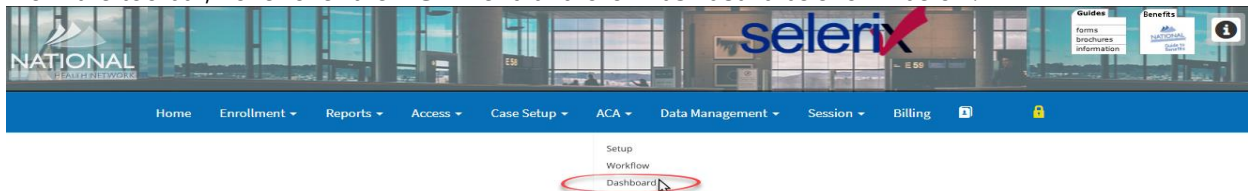
## Step 5. ACA Dashboard: Employer Approve for Submission Process



The ACA Summary report **Approve for Submission** should be completed electronically using the **ACA Dashboard** by the **employer** or their designated agent.

To access the **ACA Dashboard**

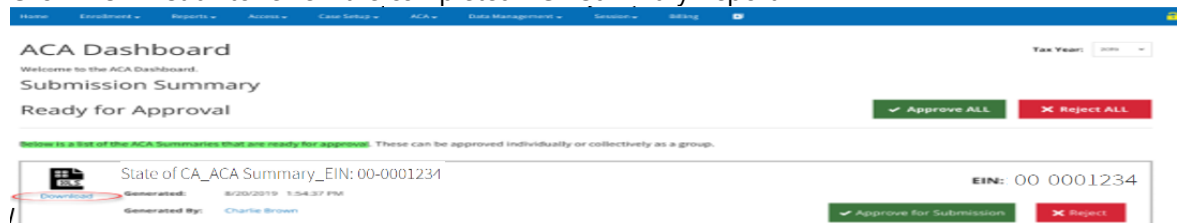
From the toolbar, hover over the **ACA** menu and click **Dashboard** as shown below:



The ACA Summary report(s) will display within the **ACA Dashboard** to allow the employer to review, **Approve for Submission** or **Reject** the file with feedback. This process is performed using the following steps outlined below.

The **ACA Dashboard** landing page will display, and ACA Summary report(s) are available under **Ready for Approval**. **Reminder:** Have multiple EIN's? Don't forget to complete these steps for each of your EIN's.

Click **"Download"** to review the completed ACA Summary Report



## ACA Dashboard: Employer Approve for Submission Process (Cont.)

Employers can **Approve for Submission** or **Reject** the file with feedback electronically via the **ACA Dashboard** using the following steps:

ACA Dashboard  
Welcome to the ACA Dashboard.  
Submission Summary  
Ready for Approval

Approve or Reject the file using one of the two options below:

Approve ALL Reject ALL

Below is a list of the ACA Summaries that are ready for approval. These can be approved individually or collectively as a group.

State of CA\_ACA Summary\_EIN: 00-0001234  
Generated: 8/20/2019 1:54:37 PM  
Generated By: Charlie Brown  
EIN: 00-0001234

Approve for Submission Reject

If the file does not require any updates/changes and is approved, click **Approve for Submission**

ACA Dashboard  
Welcome to the ACA Dashboard.  
Submission Summary  
Ready for Approval

Approve ALL Reject ALL

Click, Approve for Submission if the file requires no updates/changes.

State of CA\_ACA Summary\_EIN: 00-0001234  
Generated: 8/20/2019 1:54:37 PM  
Generated By: Charlie Brown  
EIN: 00-0001234

Approve for Submission Reject

For each **Approved** ACA Summary report a system generated email notification will be sent to the user who generated the report as well as the recipient completing the **Approve for Submission**. This notification will direct the user who generated the report to the **ACA Workflow**.

## Step 6. ACA Workflow: ACA Summary Approved

ACA Workflow  
EIN: 00-0001234 Tax Year: 2020 Filing: California

National Health Care LLC Reset Workflow

Review and Approve Approved ✓

Upload Corrections

Document Archives

**Step 7. Submitting the State-Level Request**

Once the state-level ACA Summary report has been approved. The next step is to submit the required state-level request which includes the following:

1. Complete the *State-Level Filing Submission Request Form*
2. Send your ACA State-Level Filing Request to: [Selerix Support](#) and [ACA Support](#)

**All State-Level Filing Requests must be submitted as follows:**  
 \*\*Failure to include the information required may delay your request\*\*

**Email Subject Line:** ~[Service Partner Name]: **ACA State-Level Submission:** [Employer Name/EIN]  
 Site Name:  
 Exact Case Name:  
 Exact Employer Name:  
 EIN:  
 State-Level Filing Requested:

- o California
- o District of Columbia
- o Massachusetts
- o New Jersey
- o Rhode Island

**Step 8. Communication: State-Level Submission Status Complete**

Once the state-level filing is successfully submitted, the filing details will be made available for download under Document Archives. This information will include the applicable state-level filing confirmation which should be provide to the employer for each applicable EIN.

ACA Workflow

EIN: [dropdown] Tax Year: 2020 Filing: California

National Health Care LLC [Reset Workflow](#)

▶ Review and Approve Approved ✓

▶ Upload Corrections

**Document Archives**

Below is a list of archived documentation. To upload a new file, simply click on choose file and navigate to the location of the document on your file system. Click upload to complete the process.

Archive:  No file chosen

Name	Uploaded By	Uploaded On	
1094C_Manifest_000AC_20210121T194938734Z.xml	Kelli Smith	01/31/2021 11:11 PM EST	⬇️ ✕
1094C_Request_000AC_20210121T194938734Z.xml	Kelli Smith	01/31/2021 11:11 PM EST	⬇️ ✕
State of XX_Client Name_EIN xx-xxxxxxx_Filing Confirmation_xx-xx-2021.pdf	Kelli Smith	01/31/2021 11:14 PM EST	⬇️ ✕