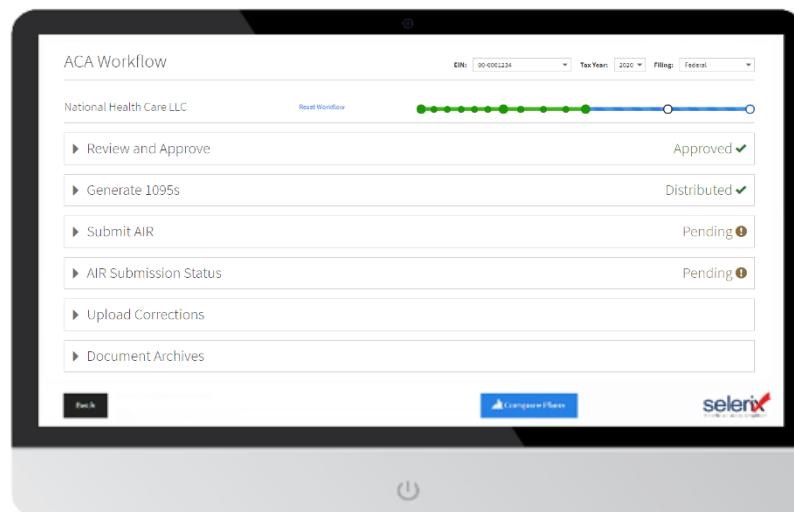




# The Selerix perience: ACA Workflow User Guide



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This document has been delivered solely for the purpose of how to manage the ACA process within the Selerix system.

This document is not provided as legal advice.

## Guide to the ACA Workflow

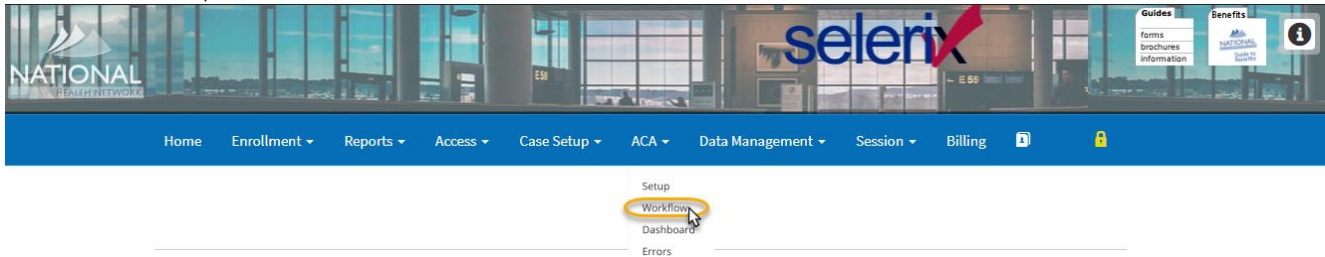
### Generate the Final ACA Summary report(s) using AIR Submission within ACA Workflow

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:

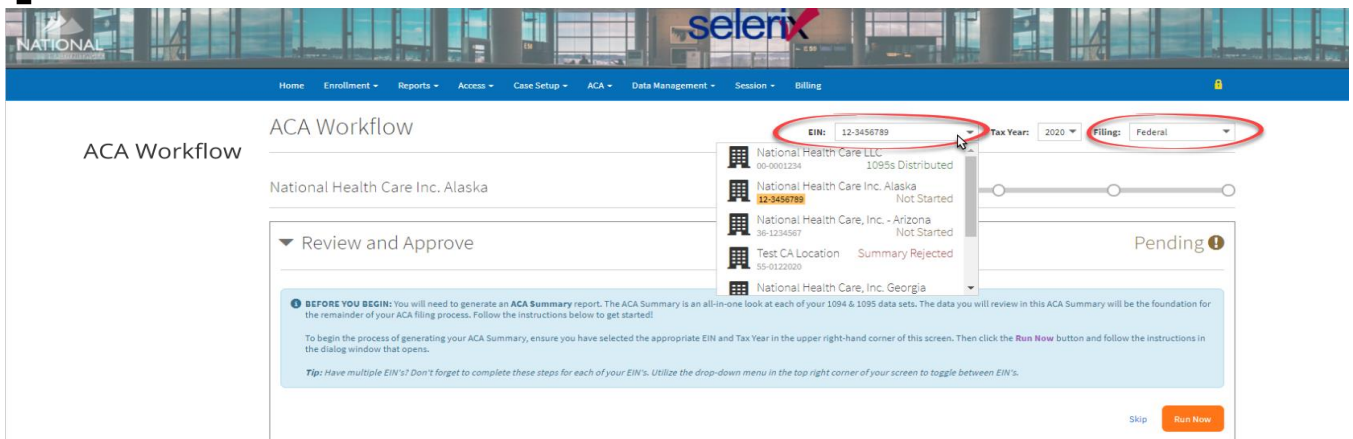


The **ACA Workflow** landing page will display, and the following steps should be completed:

1. Expand **Review and Approve**
2. Click **“Run Now”**

**Reminder:** Have multiple EIN's? Don't forget to complete these steps for each of your EIN's. Utilize the drop-down menu (as shown below) in the top right corner of your screen to toggle between EIN's.

#### ACA Workflow Enhancement – Effective January 2021: **New Federal and State-Level Indicator**



#### Did You Know

Using **“Run Now”** allows you to re-generate an ACA Summary report if any errors/issues are identified that require correction anytime during the *Review and Approve* phase. Refer to the *“ACA Workflow: Revising the Approved ACA Summary”* section of the guide.

## ACA Workflow: Complete ACA Summary Parameters

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. **If the employer is filing multiple EIN's, repeat this process for each EIN.**

ACA Summary 2020

**i** Your ACA Summary requires you to select a number of parameters applicable to your organization. These parameters will dictate the data output on your ACA Summary. Select the parameters that apply to your organization and click the **Confirm** button to begin processing your ACA Summary.

**If your organization is filing multiple EIN's, repeat this process for each EIN.**

**NOTE:** Need additional information? Hover over the name of each parameter for a description. Please ensure you have consulted with your legal/consulting department to ensure your selections match your organization's intended approach to ACA.

This is the authoritative transmittal for this ALE Member:

Yes  No

This ALE Member is a member of an Aggregated ALE Group:

Yes  No

Certifications of Eligibility

Qualifying Offer Method

98% Offer Method

Affordability Method

Federal Poverty Level (FPL)

Rate of Pay Based on Hourly Wage

Rate of Pay Based on Pay History

W2 Earnings

Rate of Pay Based on Annual Salary

Special Situations

Include offers made to part-time employees

Include 1094B and 1095B data



### ACA Workflow Enhancement – Effective January 2021: Run 1095 on Summary Approval

The new *Run 1095 On Summary Approval* parameter, if engaged, offers the option to “automatically” begin the *Generate 1095s* phase of the workflow once the *Approve for Submission* is provided.

ACA Summary 2020

Run 1095 On Summary Approval

Run 1095 On Summary Approval

## ACA Workflow: Complete ACA Summary Parameters (con't)

When selecting this parameter, completion of the applicable elements within the dialog window are required to successfully begin the Generate 1095s process using this new automated functionality.

### Include Address Page:

Run 1095 On Summary Approval

Run 1095 On Summary Approval

**Corrections Only:**  Generate only corrected forms.

**Special Situations:**  Do not mask SSN on forms.

**Include Address Page:**  I want to include the address page.



For TY2020, when selecting the "Include Address Page" option each 1095-C Form will include a 2-part address page before each form.

### Filename Format:

Run 1095 On Summary Approval

Run 1095 On Summary Approval

**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:**   
 Group All in One PDF  
 Default (i.e., "LastName-FirstName-01")  
**Group All in One PDF**  
 Group By Location  
 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 1095-C Forms within a single printer ready PDF document.

### Distribution:

Run 1095 On Summary Approval

Run 1095 On Summary Approval

**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:**   
 Group All in One PDF

**Distribution:**   
 Allow access to form by employee on enrollment site.  
 Send email to employee when available.



"Allow access" option offers easy access to the 1095-C Form under the "Forms" tab on the individual employees record within the enrollment site. The "Send email" options offers the ability to generate an automated email notification to employees on how to access their form within the enrollment site.

## ACA Workflow: Complete ACA Summary Parameters (con't)

Select applicable recipient(s) designated to receive, review and **Approve for Submission** the ACA Summary report as part of the **Qualify for Approval** process.

Once complete, click **"Confirm"** and the file will begin processing in real time as show on the indicator below

**Did You Know**

Full informational details on each of the parameters above are available within the ACA Summary report setup Located under: [Reports > Run Now > ACA Summary 20xx Tax Year.](#)

Report Parameters	Authoritative Transm	Certifications of Eligi	Aggregated ALE	Affordability Method	Special Situations	Multiemployer Interim
<p>ALE = Applicable Large Employer</p> <ul style="list-style-type: none"> <li>• Authoritative Transmittal</li> <li>• Certifications of Eligibility</li> <li>• Aggregated ALE</li> <li>• Affordability Method</li> <li>• Special Situations</li> <li>• Use Multiemployer Interim Rule</li> </ul> <p><small>As a disclaimer, we (Selerix) can only offer our understanding of the IRS guidance and expectation as it relates to these parameters along with how our system is structured to accommodate that understanding through its functionality and reporting. We always advise employers to seek guidance from their advisor and/or legal counsel for any final determinations.</small></p>						

Once the ACA Summary report generates successfully, a system produced email notification will be sent to the creator of the report within the ACA Workflow. See example notification below:

**Your Summary Report has been created.**

**National Health Care LLC (EIN: 000001234)**

The Summary Report for the EIN listed above has been created by the user below:

**Created By:** Kelli Smith  
**Created:** 09/25/2019 09:43:40 PM UTC

[Proceed to Submission Workflow](#)

## ACA Workflow: ACA Summary Pending Qualification

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.



The date, time and user associated with generating the file is captured in the workflow.

Once the ACA Summary report generates, the following steps should be completed:

1. Expand **Review and Approve**
2. Click **"Download"** to review the completed ACA Summary excel file

The **Qualify for Approval** process is designed to be completed by the ACA manager and serves as their preliminary data review confirmation and acknowledgement.

## ACA Workflow: Pending Qualification Preliminary ACA Summary Review

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.

Employee									Employer Name
Employee Name	Employee SSN	Employee Address Street	Employee Address 2	Employee Address City	Employee Address State	Employee Address ZIP	Employee Address Country	Employee Name	
Iris Aderholt	998-78-0983	5 W Monta Blvd		Salt Lake City	UT	84114	USA	National Health Care LLC	
Juanita Alexander	998-78-0535	6 Malvin St		Springfield	IL	62706	USA	National Health Care LLC	
Maryann Amash	998-78-0273	10 Lavonda St		Trenton	NJ	08625	USA	National Health Care LLC	
Nancy Amash	998-78-0761	2 Talisa Ave		Carson City	NV		USA	National Health Care LLC	
Sheryl Amash	998-78-1249	6 Verdell St		Sacramento	CA	95814	USA	National Health Care LLC	
June Amodei	998-78-0536	4 S Derenda St		Bismarck	ND	58505	USA	National Health Care LLC	
Melinda Amodei	998-78-0048	5 NW Annamarie Blvd		Harrisburg	PA	17120	USA	National Health Care LLC	
Alta Andrews	998-77-9851	3 Ardie Blvd		Annapolis	MD	21401	USA	National Health Care LLC	
Grady Andrews	998-78-0827	2 Margee Ave		Montpelier	VT	05633	USA	National Health Care LLC	
Dora Ayotte	998-78-1530	3 NE Charisse Hwy		Boston	MA	02133	USA	National Health Care LLC	
Gwendolyn Ayotte	998-78-1042	7 Gertrud St		Jefferson City	MO	65101	USA	National Health Care LLC	
Donna Bachmann	998-78-0551	5 W Li Blvd		Topeka	KS	66612	USA	National Health Care LLC	
Bertha Bachus	998-78-1568	1102 N Ralph Hwy		Salt Lake City	UT	84114	USA	National Health Care LLC	
Dale Baldwin	998-78-0303	14 Artis Hwy		Denver	CO	80203	USA	National Health Care LLC	
Bette Barber	998-78-1195	183 Todd St		Frankford	KY	40601	USA	National Health Care LLC	
Blanche Barber	998-78-0219	2 W Ralene Blvd		Helena	MT	59620	USA	National Health Care LLC	
Claire Barber	998-77-4363	3 Georgian Hwy		Springfield	IL	62706	USA	National Health Care LLC	
Lynda Barletta	998-78-0390	14 NW Judson Blvd		Tallahassee	FL	32399	USA	National Health Care LLC	
Oscar Barr	998-78-0696	4 W Paulina Blvd		Providence	RI	02901	USA	National Health Care LLC	
Gladys Barrow	998-78-1149	4 Trudi Hwy		Boston	MA	02133	USA	National Health Care LLC	
Ira Barton	998-78-1422	2 Eley Blvd		Honolulu	HI	96813	USA	National Health Care LLC	
Joanne Bass	998-78-0447	4 Thresa Blvd		Albuquerque	NM	87501	USA	National Health Care LLC	
Pat Baucus	998-78-0459	69 S Erin St		Augusta	ME	04333	USA	National Health Care LLC	
Dianne Beatty	998-78-1253	2 E Darian Ave		Baton Rouge	LA	70804	USA	National Health Care LLC	
Peter Beatty	998-78-0277	2 Eleonore St		Trenton	NJ	08625	USA	National Health Care LLC	
Douglas Begich	998-78-0719	10 SE Christene Ave		Atlanta	GA	30334	USA	National Health Care LLC	
Penny Begich	998-77-4375	2 NW Edelmiro Blvd		Little Rock	AR	72201	USA	National Health Care LLC	
Wiles Benich	998-78-0924	2 Scoville Blvd		Madison	WI	53709	USA	National Health Care LLC	



Additional resources are available on the **Most Common Form Summary Warnings** and **FAQs on the 1095-C Form Reporting** which are located in the Appendix section of this guide.

## ACA Workflow: Pending Qualification 1094-C Output Review

The following is intended as a guide to assist in your review of the employers 1094-C tab within the ACA Summary Report. Please ensure you have involved the necessary parties at the Employer level to confirm your data is in line with their expectation and obtain the Employer **"Approve for Submission"** approval prior proceeding forward.

### Reviewing Part 1

**Lines 1-6:** The 1094-C Form Lines 1 – 6 are identified under columns B – I of the ACA Summary report under the 1094-C Tab. Make sure the address lines up with the employer address used on the Forms 1095-C for employees. This is identified by unique Employer Identification Number (EIN) within the case under ACA Setup.

B	C	D	E	F	G	H	I
EMPLOYER NAME	EMPLOYER EIN	TAX YEAR	EMPLOYER ADDRESS 1	EMPLOYER CITY	EMPLOYER STATE	EMPLOYER ZIP	EMPLOYER COUNTRY
ABC ELECTRIC SERVICES, LLC	47-0928397	2018	6222 St Louis Street	Meridian	MS	39307	USA

**Line 7 – 8:** The 1094-C Form Lines 7 – 8 are identified under columns J – K of the ACA Summary report under the 1094-C Tab. This is the name and number of the person to contact with any questions at the Employer. This contact should be someone at the employer who can speak authoritatively to any questions the forms may raise. This is identified by unique EIN within the case ACA Setup and can differ by EIN.

J	K
EMPLOYER CONTACT PERSON NAME	EMPLOYER PHONE
Leslie Employer	(601) 483-2384

**Lines 9-16:** The 1094-C Form Lines 9 – 16 are identified under columns L – T of the ACA Summary report under the 1094-C Tab. Most companies will leave these blank, unless the employer has a designated government entity filing on behalf of the employer. Full DGE definition is covered in question 24 of the [IRS FAQ Link](#).

L	M	N	O	P	Q	R	S	T
DESIGNATED GOVT ENTITY	DESIGNATED GOVT EIN	DESIGNATED GOVT ADDRESS 1	DESIGNATED GOVT CITY	DESIGNATED GOVT STATE	DESIGNATED GOVT ZIP	DESIGNATED GOVT COUNTRY	DESIGNATED GOVT CONTACT PERSON NAME	DESIGNATED GOVT PHONE

**Line 17:** Skip line 17. This line is reserved for future use and is not included on the 1094-C Tab of the ACA Summary.

**Line 18:** The 1094-C Form Line 18 is identified under column U of the ACA Summary report under the 1094-C Tab. Total number of Forms 1095-C (those going to employees) associated with this EIN filing. Remember, the number of forms should match the final number of 1095-C Forms distributed for this EIN.

U
NUM FORMS
591

**Line 19:** The 1094-C Form Line 19 is identified under column X of the ACA Summary report under the 1094-C Tab. Confirm the authoritative transmittal is indicated. This indicator is required for each unique EIN.

X
AUTHORITATIVE TRANSMITTAL
Yes

## ACA Workflow: Pending Qualification 1094-C Output Review (Cont.)

### Reviewing Part 2

**Lines 20-21:** The 1094-C Form Lines 20 – 21 are identified under columns V - Y of the ACA Summary report under the 1094-C Tab. Line 20 is the aggregated data and total number of 1095-C Filed. For line 21, indicates if during ANY MONTH of the calendar year the Employer (ALE) was a member of an Aggregated ALE Group. Reminder, not all Employers will be identified as an Aggregated Employer. If check yes, you will need to review Parts III and IV.

V	W	Y
AGGREGATE YES	AGGREGATE NO	ALE NUM FORMS
Yes		591

**Line 22:** The 1094-C Form Line 22 is identified under columns Z – AA of the ACA Summary report under the 1094-C Tab. Certifications of Eligibility options: Qualified Offer Method or 98% Offer Method. You will need to ensure the parameter outlined by the Employer (ALE) in the Configuration Guide and outlined in the “parameter” of the ACA Summary matches Line 22. If elected, a “YES” indicator will be identified under one or both of the Certifications of Eligibility.

Z	AA
QUALIFYING OFFER METHOD	98 PERCENT OFFER METHOD

If the Employer (ALE) is claiming a *Certificate of Eligibility*, it will impact the coverage codes and calculations on Lines 14, 15 and 16 of the Forms 1095-C you file for employees. *This is not a mandatory section.*



**Certificates of Eligibility** are “and / or,” meaning it may be appropriate to claim none or more than one.

### Reviewing Part 3

**Lines 23 – 35:**

**Line 23:** The 1094-C Form Line 23 is identified under column “AC” of the ACA Summary report under the 1094-C Tab.

In column A:

- If the employer (ALE) offered minimum essential coverage to at least 95% of its full-time employees and their dependents for the entire calendar year, a “Yes” checkbox on line 23 should be checked for “All 12 Months” or for each of the 12 calendar months.

**CAUTION:** If the “All 12 Months” is not populated with a “YES” bring to your Clients attention.



B	C	AC
EMPLOYER NAME	EMPLOYER EIN	ALL 12 MEC YES
National Health Care, Inc. - Alabama	00-0001234	Yes

**Lines 24 – 35:** The 1094-C Form Line 24 – 35 are identified under columns “AD - AO” of the ACA Summary report under the 1094-C Tab.

- If the employer offered minimum essential coverage to at least 95% of its full-time employees and their dependents **only** for *certain calendar months*, a number will be populated for each month minimum essential coverage was offered.



If this occurs, verify that no “override” indicator is present on the file under column “MT”.

EMPLOYER NAME	EMPLOYER EIN	EIN 65	Override
Nation ACA Demo	45-6789999		

## ACA Workflow: Pending Qualification 1094-C Output Review (Cont.)

- For the months, if any, for which the employer did not offer minimum essential coverage to at least 95% of its full-time employees and their dependents, a number will be populated for each month minimum essential coverage was not offered. The 1094-C Form Line 24 – 35 are identified under columns “AP - BB” of the 1094-C Tab of the ACA Summary.
- The 1094-C Form Part III section (b) & (c) are identified under columns “BC - CL” of the ACA Summary report under the 1094-C Tab. These represent the FT employee count by month & total employee count by month.

### Reviewing Part 4

The 1094-C Form Line 36 – 55 are identified under columns “DB - FI” the ACA Summary report under the 1094-C Tab. If the Employer is a member of an aggregated ALE group, the information about your sibling organizations will be displayed here. It can include up to 30.

DB	DC	DD	DE	DF	DG
<b>ER NAME 36</b>	<b>EIN 36</b>	<b>ER NAME 37</b>	<b>EIN 37</b>	<b>ER NAME 38</b>	<b>EIN 38</b>
The INDUSTRIAL CONSTRUCTION LLC	274987688	ABC Construction Company	640429766	The Maintenance Company	640920057

**Note:** Columns “FJ” of the 1094-C Tab on the ACA Summary report is the “Override” field and should **not** have a “YES” indicator. Special situations can occur to require an override of the 1094-C data however it is not recommended.

*As a disclaimer, we (Selerix) are not consultants or legal counsel. We can only offer our understanding of the IRS expectation related to the forms with how our system is structured to accommodate that understanding through its functionality and reporting. That said, we always advise employers to seek guidance from their advisor and/or legal counsel.*

## ACA Workflow: ACA Summary Qualify for Approval

### Did You Know?

The **Qualify for Approval** process is designed to be completed by the ACA manager and confirms the preliminary data review process has been completed.

Once the ACA Summary preliminary data review is finalized the following step should be completed

1. Click “**Qualify for Approval**” to provide the ACA Summary report to the employer for their electronic approval from the **ACA Dashboard**.

Review and Approve
Pending Qualification !

**i** Your **ACA Summary** report is now ready to **Qualify for Approval**. Best Practice: Use the Qualify for Approval stage to perform a preliminary review of the data elements, to include the 1095-C, 1094-C and Warnings tabs. If your review results in data/setup changes, you will need to re-run a new Summary report to capture your latest changes. Repeat these first two steps for each ACA Summary report that was modified.

**ACA Summary review completed?** Your file is now ready to Qualify for Approval and request formal Approval for Submission of the ACA data by the employer. Simply click on the **Qualify for Approval** button that corresponds to the ACA Summary report you wish to provide to the employer for approval. Remember, by clicking Qualify for Approval, you are confirming you have performed the preliminary data review process.

**Tip:** Have multiple EIN's? Don't forget to complete these steps for each of your EIN's. Utilize the drop-down menu in the top right corner of your screen to toggle between EIN's.

ACA Summary EIN: 00-0001234

Generated: 9/25/2019 5:43:40 PM

Generated By: Kelli Smith [Parameters](#)

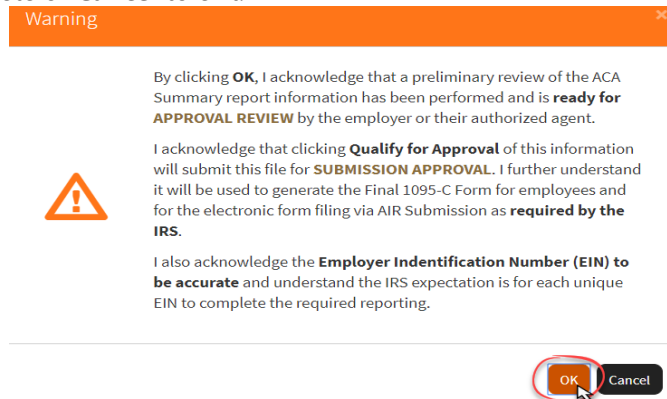
Download

Qualify for Approval

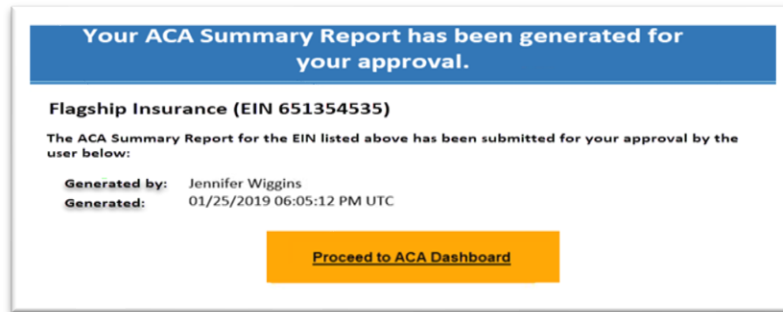
## ACA Workflow: ACA Summary Qualify for Approval (Cont.)

The following pop-up will display to confirm the file is ready to **Qualify for Approval**.

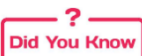
- Click **OK** to complete or **Cancel** to exit.



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:



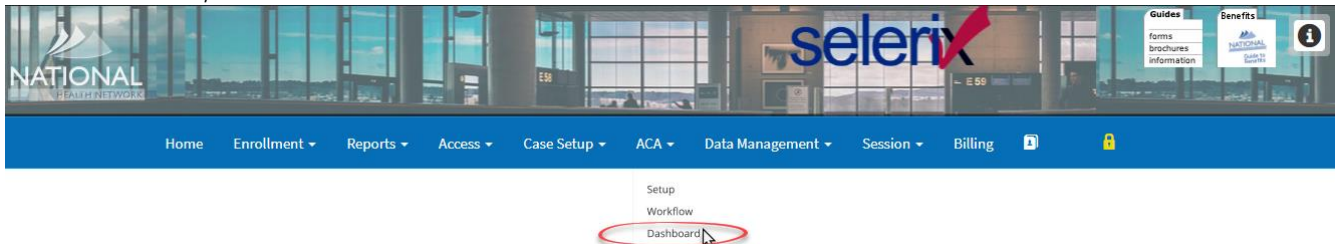
## ACA Dashboard: Employer Approve for Submission Process



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:

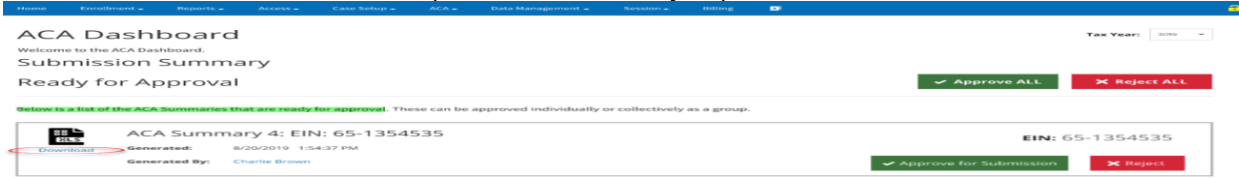


The ACA Summary report(s) will display within the **ACA Dashboard** to allow the employer to review, **Approve for Submission** or **Reject** the file with feedback. This process is performed using the following steps outlined below.

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

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.

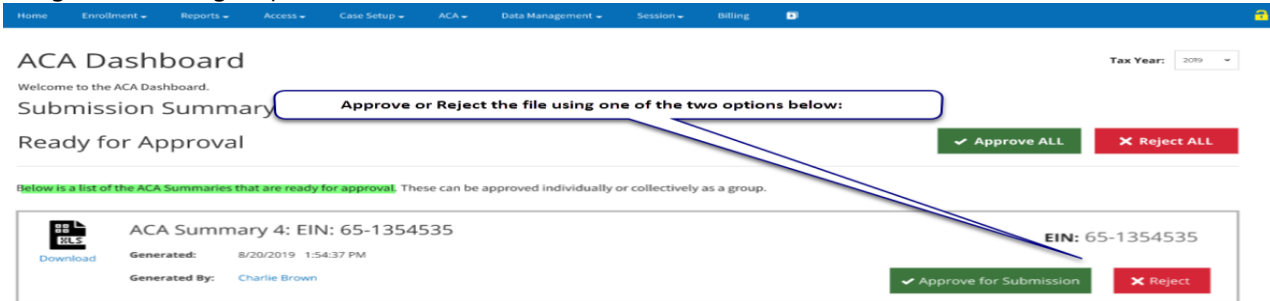
Click **"Download"** to review the completed ACA Summary Report



### Did You Know

How-To video tutorials offering quick tips on reviewing the ACA Summary Report 1095-C data is available under the [Selerix ACA Reporting Knowledge Base](#).

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



Once the report review process is completed by the Employer or designated agent, one of two scenarios will occur:

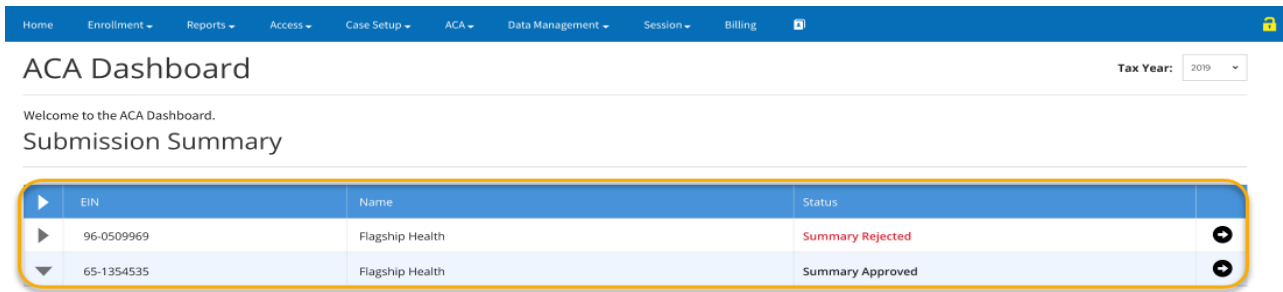
**Scenario 1:** If the file does not require any updates/changes and is approved, click **Approve for Submission**



The following pop-up will display confirming the file Approval for Submission. Click, **OK** to complete



The **ACA Dashboard** will update the status of each ACA Summary report by EIN under **Submission Summary**

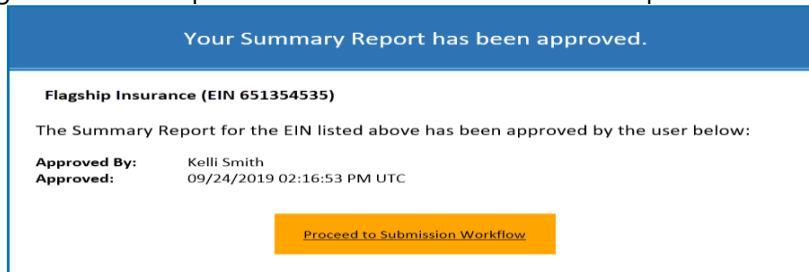


Note: Once *all* ACA Summary reports for each unique EIN, if multiple, identified under **Ready for Approval** have been *Approved* or *Rejected* the status will reflect the following:

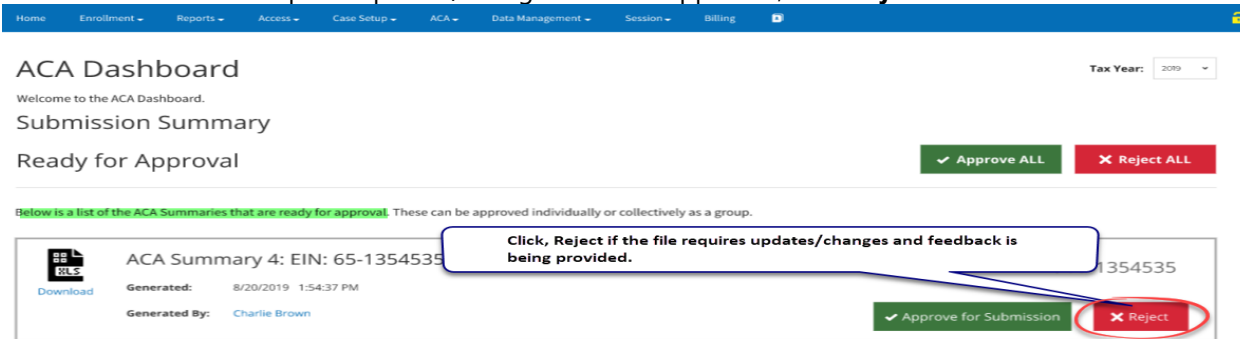
Ready for Approval

**NO qualifying ACA Summaries are ready for approval. If you feel this is an error, please contact your ACA Services Manager.**

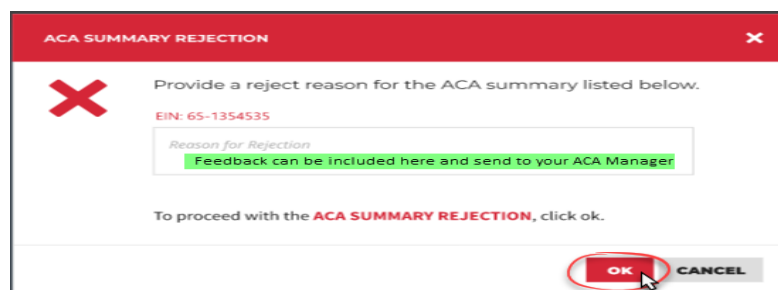
For each **Approved** ACA Summary report a system generated email notification will be sent to the user who generated the report as well as the recipient completing the **Approve for Submission**. This notification will direct the user who generated the report to the **ACA Workflow**. See example notification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



**Scenario 2:** If the file requires updates/changes and not approved, click **Reject**



The following pop-up will display confirming the file **REJECTION** and the employer or designated agent to provide the "reason for rejection". Then, click **OK** to complete



## ACA Workflow: ACA Summary Rejected

The Review and Approve stage of the ACA Workflow will update to a **REJECTED** status.

If data/setup changes are required, the ACA Summary would need to be regenerated to capture the most recent changes. Repeat the following steps for each ACA Summary report that was modified.

1. Expand **Review and Approve**
2. Click **"Run Now"**

The screenshot shows the 'Review and Approve' stage with a 'Pending Qualification' indicator. A message states: 'Your ACA Summary report is now ready to Qualify for Approval. Best Practice: Use the Qualify for Approval stage to perform a preliminary review of the data elements, to include the 1095-C, 1094-C and Warnings tabs. If your review results in data/setup changes, you will need to re-run a new Summary report to capture your latest changes. Repeat these first two steps for each ACA Summary report that was modified.' Below this, it says 'ACA Summary review completed? Your file is now ready to Qualify for Approval and request formal Approval for Submission of the ACA data by the employer. Simply click on the Qualify for Approval button that corresponds to the ACA Summary report you wish to provide to the employer for approval. Remember, by clicking Qualify for Approval, you are confirming you have performed the preliminary data review process.' A tip follows: 'Tip: Have multiple EIN's? Don't forget to complete these steps for each of your EIN's. Utilize the drop-down menu in the top right corner of your screen to toggle between EIN's.' The main content area shows 'ACA Summary EIN: 10-2000003' with a 'Rejected' status. It lists 'Generated: 10/22/2019 12:40:50 PM' and 'Qualified By: Kelli Smith'. A 'Rejected' entry shows 'Rejected: 10/22/2019 12:44:26 PM' and 'Rejected By: Kelli Smith'. A 'Reason' link is highlighted with a callout box stating 'Details regarding the report rejection can be found by clicking "reason"'. A 'Run Now' button is visible at the bottom right.

You will be prompted to complete the required report parameter information. Report Parameters are based on information provided by the employer for each unique EIN. ***If the employer is filing multiple EIN's, repeat this process for each EIN that was modified.***

Once complete, click **"Save"**. The file will begin processing in real time as show on the indicator below

The screenshot shows the 'Review and Approve' stage with a 'Processing' indicator and a loading spinner.

Once the ACA Summary report generates the following steps should be completed:

1. Expand **Review and Approve**
2. Click **"Download"** to review the completed ACA Summary excel file
3. Perform preliminary data review process

Upon completion of the ACA Summary preliminary data review the following step should be repeated:

4. Click **"Qualify for Approval"** to provide the ACA Summary report to the employer for their approval via the **ACA Dashboard**.
5. Click, **OK** as confirmation to **Qualify for Approval**

A system generated email notification will be sent to the user who generated the revised 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 revised data and **Approve for Submission**.

The employer data review process should be repeated until the ACA Summary report moves to the **Approve for Submission** status within the ACA Workflow.

## ACA Workflow: ACA Summary Approved

The Review and Approve stage of the ACA Workflow will update to an **Approved** status.



**ACA Workflow Enhancement Reminder:** If the new **Run 1095 on Summary Approval** parameter was engaged during the Review and Approve > Run ACA Summary Report phase, the Generate 1095s process begins automatically once the Approve for Submission is provided.

National Health Care LLC Reset Workflow

▶ Review and Approve Approved ✓

▼ Generate 1095s Processing ⚙️

**1095C Form Archive** Processing ⚙️

Generated: 12/31/2020 12:19:50 PM  
Generated By: Kelli Smith Recipients

If the new **Run 1095 On Summary Approval** parameter was not engaged under the Review and Approve phase the following is required once the Approve for Submission is provided.

Click, **Continue**

Review and Approve Approved ✓

Tip: Have multiple EIN's? Don't forget to complete these steps for each of your EIN's. Utilize the drop-down menu in the top right corner of your screen to toggle between EIN's.

**ACA Summary EIN: 65-1354535** Ready for Submission ✓

Generated: 8/20/2019 1:54:37 PM Download  
Generated By: Charlie Brown Parameters

Qualified: 8/21/2019 9:25:37 AM Approved: 8/21/2019 1:19:07 PM  
Qualified By: Linus Van Pelt Approved By: Lucy Van Pelt

Undo Approval

**Continue**

**Did You Know**

Qualified By is the manager performing the preliminary data review and Approved By is the Employer.

## ACA Workflow: Generate 1095s

For those **not** engaging the new 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.

Generate 1095s Pending ⓘ

**1** 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.

**ACA Summary EIN: 65-1354535** **Generate**

Generated: 8/20/2019 1:54:37 PM Download  
Generated By: Charlie Brown Parameters

Qualified: 8/21/2019 9:25:37 AM Approved: 8/21/2019 1:19:07 PM  
Qualified By: Linus Van Pelt Approved By: Lucy Van Pelt

### ACA Workflow: Generate 1095s (Cont.)

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

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:

Distribution:



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.

#### Distribution:

Run 1095 On Summary Approval

Run 1095 On Summary Approval

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:

Distribution:  Allow access to form by employee on enrollment site.  
 Send email to employee when available.



"**Allow access**" option offers easy access to the 1095-C Form under the "Forms" tab on the individual employees record within the enrollment site. The "**Send email**" options offers the ability to generate an automated email notification to employees on how to access their form within the enrollment site.

Select applicable report recipient(s) designated to receive, review and **Approve for Submission** the ACA Summary report as part of the **Qualify for Approval** process.

Recipients

Charlie Brown (charlie.brown@peanuts.com)  Lucy Van Pelt (lucy.vanpelt@peanuts.com)

Linus Van Pelt (linus.vanpelt@peanuts.com)

Use MultiEmployer Interim Rule:  Apply code 2E where applicable

Summary Description:

The **Summary Description** should offer a unique naming convention. (e.g. EmployerName\_Final ACA Summary\_mm.dd.yy)

Once complete, click "**Confirm**" and the file will begin processing in real time as show on the indicator below

▼ Review and Approve Processing

## ACA Workflow: Generate 1095s (Cont.)

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

Generate 1095s
Distributed ✓

**i** 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**

**Generated:** 1/28/2019 1:23:14 PM

**Generated By:** Kelli Smith

Download

Recipients

Distributed ✓

Skip Continue

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 for 2020

600320  
Page 3

Form 1095-C (2020)

**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"/>

**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*.

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

Generate 1095s
Distributed ✓

**i** 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**

**Generated:** 1/28/2019 1:23:14 PM

**Generated By:** Kelli Smith

Download

Recipients

Distributed ✓

Skip Continue

## ACA Workflow: Revising the Approved ACA Summary

If the revised ACA Summary report *does not require* the employer to review and **Approve for Submission**, proceed with the following steps:

1. Click **"Undo Approval"**

Review and Approve Approved ✓

ACA Summary EIN: 65-1354535 Ready for Submission ✓

Generated: 8/20/2019 1:54:37 PM [Download](#)

Generated By: [Charlie Brown](#) [Parameters](#)

Qualified: 8/21/2019 9:25:37 AM Approved: 8/21/2019 1:19:07 PM

Qualified By: [Linus Van Pelt](#) Approved By: [Lucy Van Pelt](#)

**Undo Approval** (circled in red)

[Continue](#)

2. Then click **"Run Now"** to generate a new ACA Summary (*\*be sure you verify the parameters used*)

Review and Approve Pending Approval ⓘ

ACA Summary EIN: 65-1354535 Ready for Approval ✓

Generated: 8/20/2019 1:54:37 PM [Download](#)

Generated By: [Charlie Brown](#) [Parameters](#)

Qualified: 8/21/2019 9:25:37 AM

Qualified By: [Linus Van Pelt](#)

**Undo Qualify** [Approve for Submission](#)

Skip **Run Now** (circled in red)

If the revised ACA Summary does not require the employer to review and Qualify for Approval, click "Run Now"

**Did You Know**

Using **"Run Now"** allows you to re-generate an ACA Summary report if any errors/issues are identified that require correction anytime during the *Review and Approve* phase.

Next you will be prompted to complete the required report parameter information with a pop-up. Report Parameters based on information provided by the employer for each unique EIN. **If the employer is filing multiple EIN's, repeat this process for each EIN that was modified.**

Once complete, click **"Save"** the file will begin processing in real time as show on the indicator below

Review and Approve Processing ⚙️

3. Perform preliminary review of the newly created ACA Summary report 1094/1095 & Warnings tab
4. Once the preliminary review of the revised ACA Summary report is complete, click **"Approve for Submission"**

Review and Approve Pending Approval ⓘ

ACA Summary EIN: 65-1354535 Ready for Approval ✓

Generated: 8/20/2019 1:54:37 PM [Download](#)

Generated By: [Charlie Brown](#) [Parameters](#)

Qualified: 8/21/2019 9:25:37 AM

Qualified By: [Linus Van Pelt](#)

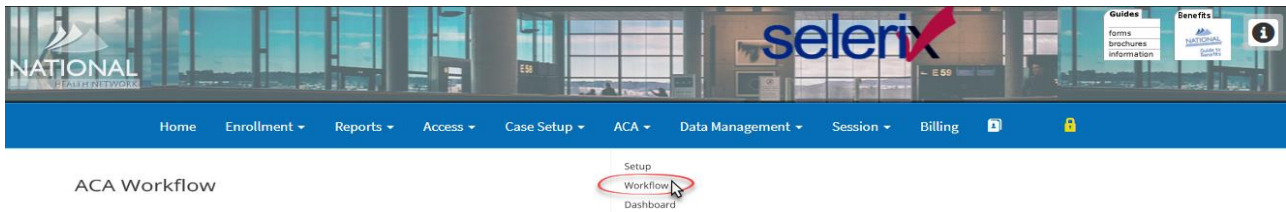
**Undo Qualify** **Approve for Submission** (circled in red)

Skip [Run Now](#)

A pop-up will display to confirm the **Approval for Submission**. Click **OK** to complete The Review and Approve stage will update to the **Approved** status. Click, **Continue**

## ACA Workflow: Generating the Electronic File using AIR Submission

To access the use the tool bar to select **ACA** and using the drop down to select the **AIR Dashboard**:



**IRS Form Filing:** this final 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.

This process is performed only *AFTER* all 1095-C PDF files have been successfully distributed. This would include a file sent to the client directly for printing/mailing or, if using a vendor for printing/mailing.

The following steps will guide you through the process of:

1. Verifying all required data elements will be captured within the AIR Submit file to the IRS
2. Submitting your electronic file to the IRS
3. Correction of errors preventing the production of the AIR file in the IRS required XML format (aka Manifest/Request)
4. Managing the IRS responses and feedback, if applicable
5. Managing TIN (Tax Identification Number) and other required corrections, if applicable
6. Employer follow up with AIR File Transmission Confirmation

### Verify All Corrected Data Elements Are Captured, if applicable


Were corrected 1095-C Forms produced or any data correction made *AFTER* the approval of the final ACA Summary used to generate the finalized 1095-C Forms within the ACA work? If yes, the next step "Revising the Approved ACA Summary" would be required to ensure the ACA Summary within the workflow is current and contains all data updates/changes.

### Review the finalized ACA Summary used to create AIR Submission File

The following outline is intended as a guide to assist in your review of the "Approved" ACA Summary within the workflow to ensure you have the most recent file required for AIR Submission. Ensure you have verified if any corrected 1095-C Forms were produced and/or if any data corrections were required that would need to be captured. If no corrected 1095-C Forms or data corrections were required proceed to the next step "Reviewing Your 1094-C Output".

#### Did You Know

A revised ACA Summary might be required to include any 1095-C Form corrections and/or data corrections made to capture those changes in the AIR Submission to the IRS. It can be identified by the naming convention used to identify as "Corrected".

	ACA Summary EIN: 00-0001234_Corrected Warnings_09.19.19	Ready for Submission ✓
Generated:	8/27/2019 10:14:39 AM	<a href="#">Download</a>
Generated By:	Kelli Smith	<a href="#">Parameters</a>
Approved:	9/17/2019 4:48:29 PM	
Approved By:	Kelli Smith	<a href="#">Undo Approval</a>

## ACA Workflow: Submit AIR

Once the review of the 1094-C data is complete and accurate the following steps should be completed:

1. Expand Review and Approve: A revised ACA Summary, if applicable, should be **"Approved for Submission"** then click **"Continue"**. If the approval is already complete, just click **"Continue"**
2. Expands Generate 1095s: click **"Skip"**
3. Expands Submit AIR: click **"Run and Submit"** (See below)

A pop-up will prompt you for confirmation, click **"confirm"** and move into **AIR Submission Status**

Once the report finishes processing, one of two scenarios will occur:

**Scenario 1:** Manifest/Request XML files completes **without** errors.

In the screenshot above, you will notice the download hyperlink: This hyperlink will open a zip file containing the Request & Manifest files. The Request file contains the 1094 & 1095-C data and the Manifest file contains information about your submission. Both files are in the required IRS XML format.

### **ACA Workflow Enhancement – Effective January 2021: State-Level Reporting Functionality**

#### ACA Workflow

EIN: 00-0001234 Tax Year: 2020 Filing: Federal  
Federal  
California  
District of Columbia  
Massachusetts  
New Jersey

National Health Care LLC

**State-Level Filing:** this final phase formally begins once the IRS forms and filing process has been successfully completed. The services in this phase can vary depending on each employer State-Level Filing requirements. *Not all employers are subject to the additional State-Level filing requirement.*

Please refer to our **State-Level Reporting Guide** for more details on this new functionality.

## ACA Workflow: Submit AIR (Cont.)

**Scenario 2:** Manifest/Request XML files completes **with** errors.

If your AIR Submission completes with errors, you will need to expand the “Errors” feature to identify the specific errors. For more details on the errors, click on the download hyperlink that contains the error.

The screenshot shows the 'AIR Submission' page. The status is 'Pending' and the submission is by 'Kelli Smith'. A 'Download' link is present. Below the submission details is an 'Errors' section with a 'Fix All' button and a search bar. A table lists errors with columns for Employee, Code, Error, and Corrected. Two errors are listed:

Employee	Code	Error	Corrected
		Line 269086: The 'urn:us:gov:treasury:irs:ext:aca:air:ty18:AddressLine1Txt' element is invalid - The value '3000 LINCOYA BAY DRIVE BUILD 0 APT 165' is invalid according to its datatype 'urn:us:gov:treasury:irs:ext:aca:air:ty18:StreetAddressType' - The actual length is greater than the MaxLength value.	<input type="checkbox"/>
		Line 373249: The 'urn:us:gov:treasury:irs:common:CityNm' element is invalid - The value 'YAZOO CITY' is invalid according to its datatype 'urn:us:gov:treasury:irs:common:CityType' - The Pattern constraint failed.	<input type="checkbox"/>

In the screenshot above, you will notice the download hyperlink: The download hyperlink that will open a zip file containing the Request file & the validation error file. The Request file contains the 1094 & 1095-C data and the validation file contain the elements that are triggering the error.

Once the zip file downloads, open the first document listed in the folder, (the text document). This document contains a list of data errors that failed a series of checks defined by the IRS.

The screenshot shows a Windows File Explorer window. The address bar shows the path: Steve Olivas > Downloads > 1094C\_Request\_BB8CV\_20160601T221727893Z.zip. The main pane shows two files:

Name	Type	Compressed size	Password ...	Size	Ratio	Date
440954ad-fce5-4cf5-85a0-88acbbf...	Text Document	1 KB	No	1 KB	39%	6/1/2
440954ad-fce5-4cf5-85a0-88acbbf...	XML File	2 KB	No	6 KB	76%	6/1/2

Most of these errors will be tied to data issues/inconsistencies:

In the example below, Line 92 of the report failed due to an employee’s last name containing an invalid (numeric) character “Employee4”.

In this instance, once the Employee last name is corrected in the enrollment site, you are able to re-run the AIR file (**AIR Submit; pg. 21 above**) and the error should be resolved.

The screenshot shows a Notepad window with the following text:

```
Line 92: The 'urn:us:gov:treasury:irs:ext:aca:air:7.0:PersonLastNm' element is invalid - The value 'Employee4' is invalid according to its datatype 'urn:us:gov:treasury:irs:ext:aca:air:7.0:PersonLastNameType' - The Pattern constraint failed.
```

**Please note:** If your file completes with a significant amount of errors or if you are unsure of how to proceed, please contact Selerix Support.

## ACA Workflow: AIR Submission Status

Once the Submit AIR finishes and is successfully submitted to the IRS, one of the scenarios will occur:

- Processing/Awaiting Response
- Rejected
- Approved with Errors
- Approved

**Did You Know**

During peak submission time, the IRS response time can and will be delayed

## ACA Workflow: AIR Submission Status

### Scenario 1: Status: Rejected

This is a result of a "Fatal" error that the IRS will not accept and requires correction. This submission constitutes a file that was NOT accepted by the IRS and MUST be resubmitted.

### Scenario 2: Status: Accepted with Errors

This is a result of a "Non-Fatal" error that typically is a TIN (Tax Identification Number) and name mismatch with the IRS. This submission status constitutes a successfully accepted AIR File and a revised file can be submitted to clear the errors if the discrepancy can be corrected.

▼ AIR Submission Status

Complete with Errors ✓

ⓘ Your AIR Submission contained errors identified by the IRS. The IRS will provide a file containing a list of the errors along with a brief explanation of each item. These errors will need to be corrected and resubmitted before the process is complete.

**Tip:** Refer to "Troubleshooting" guide for details on resolving a Rejected or Accepted with Error status

**Scenario 3:** Status: Accepted

No errors were found when processed by the IRS. No further action required with the IRS.

▼ AIR Submission Status

Complete ✓

3 Congratulations, your AIR submission has been accepted by the IRS with no errors. The AIR Submission process is complete for the EIN associated with the approval!

**AIR Submission** Accepted ✓

**Receipt ID:** 1094C-19-00100021 [Download](#)

**Submitted:** 3/3/2019 11:44:24 PM





**Submitted By:** Kelli Smith

**Status:** Accepted

**Last Check:** 3/4/2019 12:22:45 AM

Allows you to download the Manifest & Request in the IRS required XML format


## Reviewing IRS feedback statuses

Status	Definition	Action Required
Accepted 	The 1094-C and 1095-Cs transmitted for this EIN were accepted, and no errors were found when processed by the IRS.	No further action is required!
Accepted with Errors 	The entire transmission for this EIN was accepted, which means you have successfully filed as of the date your forms were transmitted, but the IRS identified some records that require correction.	<b>You may need to file a corrected return.</b> Please review the specific IRS feedback to determine which records require attention and how to address them.
Partially Accepted 	This means you have a combination of Accepted and Rejected data: for this EIN, at least one record was Accepted, and at least one record was Rejected.	<b>You may need to file a replacement return.</b> Please review the specific IRS feedback to determine which records require attention, and please see "Rejected" immediately below for more information.
Rejected 	The entire transmission for this FEIN was rejected. <b>You have 60 days from the original transmittal date to re-transmit corrected, acceptable returns and still be timely.</b> If you do successfully retransmit within the 60-day window, you will be treated as having filed on the original transmittal date.	<b>You may need to file a replacement return.</b> Please review the specific IRS feedback to determine which records require attention and how to address them.

## The Two Most Common Errors

Error Codes(s)	Description	Cause
1	FEIN and Employer Name Do Not Match	This error occurs when the employer name on Forms 1094-C and 1095-C does not exactly match the legal name stored in the IRS database for that FEIN, which can cause all or part of the transmission to be rejected. The legal employer name is the name that was entered on Form SS-4, Application for Employer Identification Number.
2	SSN and Employee Name Do Not Match	This error occurs when the individual name on a Form 1095-C does not exactly match the legal name stored in the IRS database for that SSN or Tax Identification Number (TIN). <b>Common culprit: dependent SSNs!</b>

## AIR Submission Error(s): Troubleshooting


Status	Definition	Action Required
 Rejected	The entire transmission for this FEIN was rejected. <b>You have 60 days from the original transmittal date to re-transmit corrected, acceptable returns and still be timely.</b> If you do successfully retransmit within the 60-day window, you will be treated as having filed on the original transmittal date.	<b>You may need to file a replacement return.</b> Please review the specific IRS feedback to determine which records require attention and how to address them.

### Most Common Error: FIEN and Employer Name Do Not Match

This error occurs when the exact employer name on the Forms 1094-C and 1095-C do not exactly match the legal name stored in the IRS database for that FEIN, which can cause all or part of the AIR Submission to be REJECTED. The legal employer name is the name that was entered on the Form SS-4, Application for Employer Identification Number

### 1094-C: Common Error Codes\_TY2020

Rule Number	Business Rule Text	Error Category
1094C-004-01	Form 1094C 'BusinessName' and 'EmployerEIN' in 'EmployerInformationGrp' must match the IRS database.	Data Mismatch
1094C-008-02	Form 1094C 'MailingAddressGrp' within 'EmployerInformationGrp' must have a value (either USAddressGrp or ForeignAddressGrp).	Missing Data
1094C-009-01	If Form 1094C 'BusinessName' in 'EmployerInformationGrp' has a value, then 'ContactNameGrp' within 'EmployerInformationGrp' must have a value.	Missing Data
1094C-010-01	If Form 1094C 'BusinessName' in 'EmployerInformationGrp' has a value, then 'ContactPhoneNum' within 'EmployerInformationGrp' must have a value.	Missing Data

Status	Definition	Action Required
 Accepted with Errors	The entire transmission for this EIN was accepted, which means you have successfully filed as of the date your forms were transmitted, but the IRS identified some records that require correction.	<b>You may need to file a corrected return.</b> Please review the specific IRS feedback to determine which records require attention and how to address them.

### Most Common Error: SSN and Employee Name (or covered dependent name) Do Not Match

This error occurs when the individual (Employee and/or covered dependent) name on the Form 1095-C does not exactly match the legal name stored in the IRS database for that SSN or TIN. **Common culprit: dependent SSNs!**

### 1095-C: Common Error Codes\_TY2020

Rule Number	Business Rule Text	Error Category	Severity
1095C-007-02	If 'OtherCompletePersonName' in 'EmployeeInfoGrp' has a value, then 'SSN' must have a value.	Missing Data	Report Error and Reject if over Threshold
1095C-010-01	Form 1095C 'OtherCompletePersonName' and 'SSN' in 'EmployeeInfoGrp' must match IRS database.	Data Mismatch	Report Error and Reject if over Threshold
1095C-011-02	Form 1095C 'MailingAddressGrp' within 'EmployeeInfoGrp' must have a value (either USAddressGrp or ForeignAddressGrp).	Missing Data	Report Error

“OtherCompletePersonName” Identifies: **Employee’s**

“CoveredIndividualInd” Identifies: **(Employee, Spouse and/or dependent(s)) under Part III Covered Individual**

Rule Number	Business Rule Text	Error Category	Severity
1095C-028-03	If Form 1095C checkbox 'CoveredIndividualInd' is checked, then at least one instance of 'CoveredIndividualGrp' must have a value.	Missing Data	Report Error and Reject if over Threshold
1095C-033-01	If Form 1095C 'SSN' in 'CoveredIndividualGrp' has a value, then the corresponding 'TINRequestTypeCd' must have a value of	Incorrect Data	Report Error and Reject if over Threshold
1095C-034-01	If Form 1095C checkbox 'CoveredIndividualInd' is checked, then at least one 'SSN' or 'BirthDt' in 'CoveredIndividualGrp' must have a value.	Missing Data	Report Error and Reject if over Threshold
1095C-035-01	If Form 1095C 'CoveredIndividualName' in 'CoveredIndividualGrp' has a value, then the corresponding 'SSN' or 'BirthDt' in 'CoveredIndividualGrp' has no value and checkbox 'CoveredIndividualAnnualInd' or any checkbox in	Missing Data	Report Error and Reject if over Threshold
1095C-036-01	'CoveredIndividualMonthlyIndGrp' is checked, then the corresponding 'SSN' in 'CoveredIndividualGrp' must have a value.	Missing Data	Report Error and Reject if over Threshold

## Communication: AIR Submission Status

### IMPORTANT:

Once you transmit your files, **you will receive a confirmation notification via email with a Receipt ID number. You must save this via screenshot or print to PDF file.**

This is the key identifier that verifies the AIR Submission was accepted and is required for any future reference to the reporting year filing.



Provide the Employer with the AIR Submission Status which includes the AIR Submission Confirmation for each unique EIN. Along with any TIN, errors triggered as part of the *Approved with Errors* status.

### Status: Accepted

IRS AIR Filing Status (Accepted NO Errors) to the Employer which would include the AIR Submission confirmation via PDF file format. (See example of confirmation)

**Your AIR Submission was Accepted!**

**WOODHOUSE SOUTH CITY, INC (EIN: 461585835)**

The IRS has processed your AIR submission with a status of Accepted. Click the button below to access your Submission Workflow to view and correct the errors related to this submission.

**Receipt ID:** 1094C-19-00100056

**Submitted:** 03/04/2019 05:24:46 AM UTC

**Status:** Accepted

**Responded:** 03/04/2019 05:59:34 AM UTC

### Status: Accepted with Errors

IRS AIR Filing Status (Accepted w Errors) to the Employer which would include the AIR Submission confirmation via PDF file format. (See example of confirmation)

**Your AIR Submission was Accepted!**

**WOODHOUSE LINCOLN, INC (EIN: 476899782)**

The IRS has processed your AIR submission with a status of Accepted (6 errors). Click the button below to access your Submission Workflow to view and correct the errors related to this submission.

**Receipt ID:** 1094C-19-00100057

**Submitted:** 03/04/2019 05:24:46 AM UTC

**Status:** AcceptedWithErrors

**Responded:** 03/04/2019 05:59:31 AM UTC

A separate secure email should be provided to the Employer containing the excel ACA Error (TIN) file. The error file is downloaded from AIR Submission within the ACA Workflow as identified below:

Status: Accepted with Errors  
Last Check: 3/4/2019 12:19:41 AM

Identifies specific Errors

Employee	Code	Error	Corrected
<a href="#">DAVID G. EDLESTON</a>	Shared-008	The Information Return 'CoveredIndividualName' and 'SSN' within 'CoveredIndividualGrp' must match the IRS database.	<input type="checkbox"/>

## Glossary of Key Terms

Term	Acronym	Definition
<b>Affordable Care Act:</b>	<b>ACA</b>	<b>Patient Protection and Affordable Care Act.</b> The first part of the comprehensive health care reform law enacted on March 23, 2010. The name " <b>Affordable Care Act</b> " is usually used to refer to the final, amended version of the law. (It's sometimes known as "PPACA," " <b>ACA</b> ," or " <b>Obamacare</b> .")
<b>Applicable Large Employer:</b>	<b>ALE</b>	A company is an Applicable Large Employer for a given calendar year if it employed an average of 50 or more full-time employees (including <u>full-time equivalents</u> ) in the prior calendar year.
<b>Employer Identification Number:</b>	<b>EIN</b>	Also known as the <b>Federal Employer Identification Number (FEIN)</b> or the Federal Tax <b>Identification Number</b> , is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification.
<b>Full Time Employee:</b>	<b>FTE</b>	An <b>employee</b> employed on average at least 30 hours of service per week, or 130 hours of service per month.
<b>Variable Hour (Part Time) Employee:</b>	<b>VHE or PTE</b>	Employees whose hours are unpredictable, such as seasonal or PT (variable hour). In other words, the employee's hours vary such that it is not possible to determine in advance whether the employee will work 30 weekly (or 130 monthly) hours or more during their period of employment.
<b>Full Time Equivalent Employee:</b>	<b>FTE</b>	Refers to a variable hour (PT) employee whose number of hours average at least 30 hours of service per week, or 130 hours of service per month, during the employers defined measurement period.
<b>Hour of Service:</b>		Refers to each hour in which an employee is paid, or entitled to payment, for the performance of duties for the employer, and each hour for which an employee is paid, or entitled to payment, for a period of time during which no duties are performed due to vacation, holiday, illness, incapacity (including disability), layoff, jury duty, military duty or leave of absence.
<b>Affordable Coverage:</b>		A job-based health plan covering only the employee that costs 9.86% (as adjusted) or less of the employee's household income.
<b>Minimum Essential Coverage:</b>		Any insurance plan that meets the Affordable Care Act requirement for having health <b>coverage</b> . To avoid the penalty for not having insurance you must be enrolled in a plan that qualifies as <b>minimum essential coverage</b> (sometimes called "qualifying health <b>coverage</b> ").
<b>Minimum Value:</b>		An employer-sponsored plan provides minimum value if it covers at least 60% of the total allowed cost of medical benefits that are expected to be incurred under the plan.
<b>Lookback Period:</b>	<b>LBP</b>	A period of time in the past that is used to analyze the variable hour (part time) work force. In the case of the ACA, the lookback period can range from 3-12 months.
<b>Lookback Report:</b>		Report used to identify variable hour (part time) employees who averages the IRS hours threshold and medical coverage would need to be offered.
<b>Initial Measurement Period:</b>		New employees whose hours are unpredictable, such as seasonal or variable hour, will have their status determined by looking over a period of time called a " <b>initial measurement period</b> ," which can be 3-12 months. The start date of each new employee's Initial Measurement Period is based upon the <i>new employee's hire date</i> . It does not start on the same date as the Standard Measurement Period.

## Glossary of Key Terms

Term	Acronym	Definition
<b>Initial Administrative Period:</b>	<b>IMP</b>	The period of time an employer's calculates the average hours of service of PT (variable hour) employee during the Initial Measurement Period, notify eligible employees and enroll employees who elect coverage before day one of the Initial Stability Period.
<b>Initial Stability Period:</b>	<b>ISP</b>	The period during which the employer must offer coverage to all newly-hired employees who worked on average at least 30 hours per week or 130 hours per month during the Initial Measurement Period.
<b>Standard Measurement Period:</b>	<b>SMP</b>	The period of time to look back at the hours of service worked over the course of at least 3 but no longer than 12 months to determine if an ongoing PT (variable hour) employee averaged at least 30hrs per week on average (130 hrs. per month).
<b>Standard Administrative Period:</b>		The period of time the employer totals and averages the hours of service of each employee during the SMP, notify eligible employees, explain coverage available under the plan, answer questions, collect materials from employees, and enroll employees who may elect coverage.
<b>Standard Stability Period:</b>		The period of time not less than 6 months and no more than 12 months (and equal to the corresponding measurement period) during which the employer must offer medical coverage to individuals identified as full-time during the preceding measurement period, regardless of hours worked during the stability period).
<b>Ongoing Employee:</b>		An employee who has been employed by an applicable large employer for at least one complete standard measurement period
<b>Mainland single federal poverty line:</b>		The annual dollar amount in the federal poverty guideline chart for a single-member household in any of the 48 contiguous states \$12,140 (2019). Therefore, <b>qualifying offer</b> means the employee's cost for employee-only coverage does not exceed \$99.75 per month for 2019 (as adjusted)
<b>Control Group:</b>		The IRS defines businesses as a group of related businesses that have common ownership. If a controlled group exists as defined by the applicable Internal Revenue Code (Code) sections, the employees of those businesses are considered together for certain qualified plan requirements.
<b>Self-insured health plan:</b>		A self-funded, or self-insured, plan is one where the plan sponsor (employer) operates its own health plan instead of purchasing a fully-insured plan from the insurance carrier.
<b>Fully-insured health plan:</b>		A fully-insured health plan is one where the plan sponsor (employer) contracts with an insurance carrier and pays a fixed premium to the carrier for an annual contract based upon the types of benefits coverage selected.
<b>SSN:</b>		Social Security Number
<b>TIN:</b>		Taxpayer Identification Number
<b>TCC Code:</b>		Transmitter Control Code used to file forms Electronically with the IRS
<b>Minimum essential coverage:</b>	<b>MEC</b>	Means any employer-sponsored group health plan with medical benefits. Excepted benefits (e.g., most types of dental and vision plans, flexible spending accounts).

## Glossary of Key Terms

Term	Acronym	Definition
<b>Minimum value coverage:</b>	<b>MV</b>	Means that the minimum essential coverage plan's share of total allowed cost of benefits is at least 60 percent of such costs.
<b>Individual Coverage HRA:</b>	<b>ICHRA</b>	The individual coverage Health Reimbursement Arrangement (HRA) is an alternative to offering a traditional group health plan to your employees. Employers can now use qualified ICHRA's offered to employees to satisfy the ACA Employer Mandate based on certain criteria and affordability requirements.
<b>Affordable:</b>		Means that the employee's required contribution for self-only coverage does not exceed 9.86 percent for 2019 (as adjusted) of the employee's income from the employer.
<b>Form 1095-C:</b>		Form provided by employers to employees about health insurance coverage, offer and in some cases individuals covered.
<b>Form 1094-C:</b>		Form required to provide information about whether or not the ALE offered affordable minimum essential health coverage (MEC) and enrollment in minimum essential health coverage for eligible employees. Form 1094-C will transmit forms 1095-C to the IRS.