



## THE EXECUPAY ACA MONITOR USERS GUIDE

Navigating the Affordable Care Act through the  
ongoing use of the Execupay ACA Monitor

### Abstract

This document is designed to assist the reader with the setup, use, and ongoing maintenance required to manage Federal ACA Reporting with the Execupay ACA Monitor and associated tools.

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# ACA Monitor Users Guide

## Introduction

This guide is assembled in three main sections:

- System Level Company Setup (Managed by your payroll service bureau)
  - Enabling ACA functionality for your company
  - Engaging the grouping of companies where required
- Employee Level Event Management
- The ongoing use of the ACA Monitor for compliance and reporting purposes

## Setup

### Company Setup

#### Adding ACA Group to the Client

Within the Execupay Payroll Suite, in the Company setup screen (Client/Edit Company), go to the Groups tab.

Group Basic Info | Group Payable Info

Group No: 4 | Group Name: PPACA Hours

+ New | - Delete

| Group # | Group Name        |
|---------|-------------------|
| 0       | Overtime Group    |
| 1       | All Pays Group    |
| 2       | Section 125 (CAF) |
| 3       | Child Support     |
| 4       | PPACA Hours       |
| 5       | PPACA Benefits    |

Two groups must be added\* prior to working with the ACA Monitor:

**PPACA Hours**

**Group Pay Settings**

Include Pay Group  
 Exclude Pay Group  
Include All Pays Except Ones Listed

**Group Ded Settings**

Include Deduction Group  
 Exclude Deduction Group  
Include Only Deductions Listed

**Group Memo Settings**

Include Memo Group  
 Exclude Memo Group  
Include Only Memos Listed

**PPACA Benefits**

**Group Pay Settings**

Include Pay Group  
 Exclude Pay Group  
Include Only Pays Listed

**Group Ded Settings**

Include Deduction Group  
 Exclude Deduction Group  
Include Only Deductions Listed

**Group Memo Settings**

Include Memo Group  
 Exclude Memo Group  
Include Only Memos Listed

The PPACA Hours group by default includes all pays.

The PPACA Benefits group includes all of the deductions and memos that are included in the health benefits offered. They will be used to determine the low cost used for ACA calculations and also to determine if the employee was offered benefits.

*\*Existing clients will require these additions to be made. The ACA Groups will be automatically added to new clients as they are created.*

## Company Group Setup

If several companies belong to an aggregate group for ACA reporting purposes, they will need to be setup within the Company Group tool. This is found in the Execupay Payroll Suite 'Company' drawer.

| Type | Description |
|------|-------------|
| ACA  | 26 LTD      |

  

| Company                | Start Date | End Date | Master Company?                     |
|------------------------|------------|----------|-------------------------------------|
| 4 - The Sample Company |            |          | <input checked="" type="checkbox"/> |
| 26 - Sample            |            |          | <input checked="" type="checkbox"/> |

1. Click on Insert Group to create a new group and select ACA as the Group Type.
2. In the Description enter a name for the group. This will be the name that appears in the list on the ACA monitor.
3. Click on Insert Company to add the companies that belong to this group.
  - a. If required, enter the beginning and ending date that the company will be a member of the aggregate group.
4. Select a "Master Company" for the group
  - a. If a Master Company is selected, its ACA settings will be used for default settings should companies within the group not have unique settings established.

The month entered will be used to check the appropriate boxes on form 1094-C Part III col(d).

Setting up an aggregate group will trigger the Form 1094-C to fill in Part III. It will fill in the first 30 members it finds in the group.

Remember to click Save when any changes or additions are made.

## Employee Setup

### Employee Events

| Company      | Employee     | Event                      | Start Date | End Date  | Next Date | Notes     |
|--------------|--------------|----------------------------|------------|-----------|-----------|-----------|
| 119 - Coo... | 1897 - Fl... | ACA Form 1095 Override ... | 5/1/2015   | 5/31/2015 |           |           |
| 119 - Coo... | 674 - He...  | ACA Status Change          | 1/1/2014   | 1/1/2014  |           | Full-Time |
| 119 - Coo... | 674 - He...  | ACA Status Change          | 1/1/2014   | 1/1/2014  |           | Full-Time |

#### ***ACA Benefits Eligibility***

This is the event that covers when the employee is eligible for benefits. Fill in the beginning date. For ACA reporting, this also means that the employee was offered coverage. This is an optional event. It does not need to be used if the employee has a health care deduction or memo for that reporting period. That deduction/memo will also mean for ACA reporting purposes that the employee was offered coverage.

#### ***ACA Declination of Coverage***

This is the event that covers the employee opting out of coverage. Fill in the beginning and ending date. For ACA reporting, this also means that the employee was offered coverage but declined. This is an optional event. It does not need to be used if the employee has a health care deduction or memo for that reporting period. That deduction/memo will also mean for ACA reporting purposes that the employee was offered coverage.

#### ***ACA Form 1095 Override Box 14***

This is the event that allows for the 1095-C form box 14 values to be overridden. Enter the code(described below) and the beginning and ending date. It will use the month value from these dates to pick the months to override on the form.

For box 14, the system will default the code to 1E if the employee was offered coverage. This code means Minimum Essential Coverage providing minimal value offered to employee, dependent and spouse. If the employee was not offered coverage, the system will enter a code 1H.

For a more thorough definition of the codes, please refer to the instructions for the 1095. If the previous code described does not apply to the employee, read through the list of codes in the 1095 instructions and pick the letter that applies. Do not enter the 1, just the letter. For instance, if code 1A is the appropriate code for that employee, enter an A in the event.

Also note, that there is a company override that affects all employees for this box. See company setup/coverage override in previous section to determine if the override should be placed on the company level or employee level.

#### ***ACA Form 1095 Override Box 16***

This is the event that allows for the 1095-C form box 16 values to be overridden. Enter the code(described below) and the beginning and ending date. It will use the month value from these dates to pick the months to override on the form.

For box 14, the system will default the code to 1E if the employee was offered coverage. This code means Minimum Essential Coverage providing minimal value offered to employee, dependent and spouse. If the employee was not offered coverage, the system will enter a code 1H.

For a more thorough definition of the codes, please refer to the instructions for the 1095. If the previous code described does not apply to the employee, read through the list of codes in the 1095 instructions and pick the letter that applies. Do not enter the 1, just the letter. For instance, if code 1A is the appropriate code for that employee, enter an A in the event.

### ***ACA Initial Assessment Period***

This is the event that covers an employee’s initial assessment period if the employer chooses to implement one. Fill in the beginning and ending date. This is an optional event. It does not need to be used if the employer chooses not use an initial assessment period. This event can be entered manually. It also can be setup to be created by the system. To do this, setup the initial assessment rule as described in the previous section on company setup. When this is setup, all new employees will get the event. To create records for employees already hired, run the Fill in prior information option on the ACA monitor.

### ***ACA Status Change***

This is an event created when the employee’s ACA status is changed. The information in the record is a status and a date. The way it is read is that the employee’s status was the status in this record from the beginning of the year up to the date in the record. The employee’s current status is what is showing on the employee screen/HR Basic tab. The current status is also in the ACA monitor on the Employee Classification screen. If there is more than one ACA Status event for the year for an employee, it is read as above except changing “the beginning of the year” to “since the last ACA Status record date”. If more than one ACA Status record per year, they would be interpreted in date order.

## Using the ACA Monitor

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### ACA Monitor Screens



The ACA monitor screens are designed to be setup and used from left to right. Each screen should be completely setup before moving to the next section as the setup from the previous screen will affect some calculations on the next section.

### Dashboard

This is a quick view of the company’s ACA figures. It gives a quick and easy view of the company’s ACA status and employee figures. This screen will not be totally correct until all of the next sections are setup. Once this is done, this screen is a great reference of the current state of the company.

Step 1

**Company Settings**

The PPACA settings for this company are ok.



**STEP #1 - Company Settings**

|  |  |
|--|--|
|  | "The PPACA settings for this company are ok."  |
|  | "There are no PPACA settings for this company. Please go to settings tab and enter the information." |
|  | N/A  |
|  | N/A  |

Step 2

**Large Employer Status**

You currently do not meet the requirement for a large employer.

You currently do not meet the requirement for W2 Health Care Reporting.



**STEP #2 - Large Employer Status**

|  |   |
|--|---|
|  | "You currently meet the requirement for a large employer."                                      |
|  | "You currently do not meet the requirement for a large employer but are nearing the threshold." |
|  | "You currently do not meet the requirement for a large employer."                               |
|  | N/A   |

Step 3

**Employee Classification**

You currently have employees that may be classified incorrectly. (4)



**STEP #3 - Employee Classification**

|  |  |
|--|--|
|  | All employees appear to be classified correctly.                 |
|  | N/A  |
|  | You currently have employees that may be classified incorrectly. |
|  | You currently are not subject to this requirement.               |

Step 4

**Employee Coverage**

You currently are not subject to this requirement.



**STEP #4 - Employee Coverage**

|  |  |
|--|--|
|  | All Full-Time employees are receiving benefits.                |
|  | N/A  |
|  | You currently have Full-Time employees not receiving benefits. |
|  | You currently are not subject to this requirement.             |

Step 5

**Employee Affordability**

You currently are not subject to this requirement.



**STEP #5 - Employee Affordability**

|  |   |
|--|---|
|  | All employees appear to be receiving affordable benefits.   |
|  | N/A   |
|  | You currently have Full-Time employees paying benefits over 9.5% of their federal taxable wages.  |
|  | You currently are not subject to this requirement. OR There is insufficient data for this calculation. There are no Full-Time employees receiving benefits. If full-time employees but no one receiving benefits. |

## ACA Settings

### ACA Excluded Hours

Hours Benefits Low Cost Periods/Rpt Options

#### ACA Excluded Hours

- 0-Regular Pay
- 1-Tips
- 2-Vacation
- 3-Sick
- 4-Severance
- 5-Jury
- 6-Makeup Earnings
- 7-Holiday
- 8-Bonus
- 9-Compensation
- 10-do not use
- 11-Pay in lieu of Vacation
- 12-Expenses
- 13-Vac Accr Corr
- 14-MIT Training
- 18-Hourly Bonus
- 19-Auto Fringe

In calculating an employee's ACA Status, all hours except the ones selected here will be used to determine ACA Status. To exclude any hours, just mark the box next the hours needing to be excluded

### ACA Benefits

Hours Benefits Low Cost Periods/Rpt Options

#### ACA Benefits

Included Deductions

- 1-401(k)
- 2-Inactive/CAF/Short Term Disability
- 3-Inactive/Long Term Disability
- 4-Inactive/Hospital Indemnity
- 5-Inactive/Vision
- 6-Inactive/Short Term Disability
- 7-Inactive/CAF/Cancer
- 8-Inactive/CAF/Accident
- 9-Inactive/CAF/Dental
- 10-Inactive/CAF/Dependent Life
- 11-Inactive/FSA/Medical Health Care Spending Acct
- 12-Inactive/CAF/Health
- 13-Inactive/CAF/Life
- 14-Uniform
- 15-Child Support

Included Memos

- 130-CAF/Medical Base
- 131-CAF/Medical buy-up
- 132-CAF/Medical HD/HAS
- 133-CAF/Medical SRC
- 134-CAF/Hospital SRC

We need to know which deductions and memos are associated to health care benefits. Check the boxes for all the deductions and memos for any health care benefit that should be used in determining which employees have benefits.

## Low Cost

| Hours   | Benefits    | Low Cost        | Periods/Rpt Options |
|---|-------------|-----------------|---------------------|
| <b>ACA Benefit Low Cost Option</b>                |             |                 |                     |
| Drag a column header here to group by that column |             |                 |                     |
| Code  | Description | Low Cost Option |                     |
| 130   | 130-Gold    | 42.00           |                     |
| 131   | 131-Silver  | 42.00           |                     |
| 132   | 132-Bronze  | 42.00           |                     |

For each deduction selected in the ACA Benefits section, we need to know the low cost option for that benefit to determine benefit affordability. If you are not sure about your low cost options, consult with your health care agent.

## Periods / Report Options

| Hours | Benefits | Low Cost | Periods/Rpt Options |
|-------|----------|----------|---------------------|
|-------|----------|----------|---------------------|

### Measurement Period

| Measurement Period |                      |
|--------------------|----------------------|
| Start Month:       | <input type="text"/> |
| Start Day:         | <input type="text"/> |
| No. Months:        | <input type="text"/> |

This is the period of time used to calculate average hours for the company or employee. This period is used to determine if the company is subject to the ACA laws.

### Administrative Period

| Administrative Period |                      |
|-----------------------|----------------------|
| Start Month:          | <input type="text"/> |
| Start Day:            | <input type="text"/> |
| No. Months:           | <input type="text"/> |

This is the time period after the measurement period that the company is allowed to use to gather the information on the calculations on the employees and offer insurance if needed. The company does not have to use this time period.

### Stability Period

| Stability Period |                      |
|------------------|----------------------|
| Start Month:     | <input type="text"/> |
| Start Day:       | <input type="text"/> |
| No. Months:      | <input type="text"/> |

This is the period of time after the measurement and administrative in which the employee ACA classification and benefits offered must remain the same.

## New Employee Rules

| New Employee Rules              |                      |                      |                |
|---------------------------------|----------------------|----------------------|----------------|
| Initial Assessment Prd lasts:   | <input type="text"/> | <input type="text"/> | starting from: |
| Eligible for Benefits starting: | <input type="text"/> | <input type="text"/> | after:         |

There are two rules that can be set up for new employees to assist in automatically filling in the employee periods in employee events. The first rule is the initial assessment rule which fills in the employee initial assessment period event. To set up the initial assessment rule, fill in the number of days or months in the first box. Then select the option Day/Month in the next box to coincide with that number. The last box is when to start this period. It is either from hire date or from the first day of the first full month after the hire date.

The other rule is the employee benefit rule. This creates the event employee benefits eligibility. This should only be used in the case where the employer pays the total cost of the employee health care and no deduction or memo is setup for the employees who have insurance. It follows the same setup style as the initial assessment setup.

## Look-back Period

There is also a look-back period. It is automatically set to the measurement period. This can be changed to a different period if there needs to be a different time period to perform calculations on.

## Report Options

| Report Options                |                      |                               |                      |
|-------------------------------|----------------------|-------------------------------|----------------------|
| Certification of Eligibility: | <input type="text"/> | Affordability override:       | <input type="text"/> |
| Coverage Override:            | <input type="text"/> | 4980 Transition Relief:       | <input type="text"/> |
| Previous Low Cost:            | <input type="text"/> | Date Previous low cost ended: | <input type="text"/> |

### Certification of Eligibility

It is highly recommended to familiarize yourself with the 1094-C and 1095-C to understand these options. There will be a code or an option to check a certain box of either of these forms. The form instructions will have information on these items and when to pick them.

### Coverage Override

This is used to check a box on form 1094, box 22. Select the letter of the box that needs to be checked. There are 2 and 3 letter combinations if more than one box needs to be checked.

### Previous Low Cost

This is used to override the code in box 14 on the form 1095 for all employees in the company. Select the appropriate letter of coverage. For instance, if code 1A should be used for all employees offered coverage, select A. By default the code in box 14 is 1E. Enter an override here if that is not the appropriate code for the entire company.

### Affordability Override

Enter a code here to override the code in box 16 on form 1095 in the case where the employee was offered coverage but opted out. By default, it will put the code 2F for all employees with this case. If the company uses another safe harbor for affordability, i.e. federal poverty line, enter the letter of the appropriate code to override the 2F for all employees of the company. Please see the instructions for box 16 on the form 1095 for a more detailed description of the codes. The codes currently available to override are 2F, 2G and 2H.

### 4980 Transition Relief

This is used on form 1094, Part II col(e). Please see form 1094 instructions for this column. If the code A or B apply, select the appropriate one.

## Larger Employer Status

This screen shows the company average hours calculations and the W2 count. This is what the Large Employer determination is based on.

### Employee Count

To be subject to the employer-shared responsibility provisions and the play or pay penalties, an employer must have at least 50 full-time employees or full-time equivalents during the preceding calendar year.

The Total Employees is the sum of your current Full Time Employees plus the calculation Full-Time Equivalents. If this is great than 50 during the last 6 months of the prior year then you qualify for Larger Employee Status and are subject to the employer-shared responsibility provisions and the play or pay penalties.

| Month     | Full Time Employees | + Full-Time Equivalents | = Total Employees |
|-----------|---------------------|-------------------------|-------------------|
| > July    | 3.0                 | 1.8                     | 4.8               |
| August    | 1.0                 | 1.9                     | 2.9               |
| September | 16.0                | .0                      | 16.0              |
| October   | 3.0                 | 10.4                    | 13.4              |
| November  | .0                  | .0                      | .0                |
| December  | .0                  | .0                      | .0                |
| Average   | 3.8                 | 2.4                     | 6.2               |

### W2 Health Care Reporting

If you had at least 250 W2's in the previous year, you are required to show any employer paid health premium dollars on employee W2 forms. Be sure that these amounts are recorded in the system. If you have any questions about it, please ask your payroll specialist.

| Item | Year | Count |
|------|------|-------|
| > W2 | 2014 | 0     |
| 1099 | 2014 | 0     |

## Employee Classification

This screen shows the average hours calculated per employee and shows the current and recommended ACA status. The screen has options to change multiple employees at one time to the recommended status. This is done by checking the Change Status button. The employee status can also be updated individually.

**Employee Classification**  Show Misclassified Only  Show Div/Dept No. only

Drag a column header here to group by that column

| Company | ID | First  | Mid.    | Last    | Division         | Department    | Avg Hrs        | Current ACA Status | Calculated ACA Status | Hire Date  | Term Date |
|---------|----|--------|---------|---------|------------------|---------------|----------------|--------------------|-----------------------|------------|-----------|
| >       | 26 | 8      | rosa    | marie   | tester Robertson | 1 - Northwest | 1 - Carpenter  | .00                | Part-Time             | 3/2/2015   |           |
|         | 26 | 787882 | Marty   |         | Smith            | 1 - Northwest | 3 - Supervisor | .00                | Part-Time             | 11/26/2014 |           |
|         | 26 | 787883 | Harry   | T.      | Test5            | 1 - Northwest | 2 - Painter    | .00                | Part-Time             | 10/30/2014 |           |
|         | 26 | 787884 | Abraham | Lincoln | Test1            | 1 - Northwest | 1 - Carpenter  | .00                | Part-Time             | 10/14/2014 |           |

**Employee Classification**  
 ACA Status is independent of any other employee classification. A full-time employee is a common law employee who has on average at least 30 hours of service per week or 130 hours in a calendar month.  
 Shown are your employees with their current ACA Status and our calculated ACA Status based on hours worked.

By default, it show only employees the system sees as misclassified. Unchecking the Show Misclassified Only will show all employees. The division and department have a checkbox to show only the number in the grid and not the number and description.

## Employee Coverage

Once the employees have the correct status, click on the recalculate and go to the next screen, the employee coverage screen. This screen will examine all employees that are Full-Time employees according to the ACA rules. It will show if they are not receiving benefits. The Receive Benefits will indicate if the employee has a deduction or memo setup that is in the PPACA benefits group. In other words, if the employee is receiving an ACA deduction.

**Employee Coverage**  Full-Time Only  Not Receiving Benefits Only

Drag a column header here to group by that column

| Company | ID | First | Mid.        | Last | Div     | Dept | ACA Status  | Receive Benefits |
|---------|----|-------|-------------|------|---------|------|-------------|------------------|
| >       | 26 | 1     | Maria       | E.   | Borilla | 0    | 4 Part-Time | NO               |
|         | 26 | 2     | Joe         |      | Smith   | 0    | 1 Part-Time | YES              |
|         | 26 | 4     | Jolly Jolly |      | Wolly   | 0    | 2 Part-Time | NO               |
|         | 26 | 5     | Debbie      |      | Test    | 0    | 4 Part-Time | YES              |
|         | 26 | 6     | Danny       | W    | Curtis  | 0    | 1 Part-Time | YES              |
|         | 26 | 7     | Jackie      |      | Smith   | 0    | 2 Part-Time | NO               |

## Employee Affordability

Once all of the Full-Time employees are receiving benefits, hit the recalculate button and go to the employee affordability tab. This screen will show the employees who are receiving benefits and whether or not their deduction is within the 9.5% of federal taxable range. By default, it will show only the employees who are not in this range and action needs to be taken. By unchecking the Show Exceptions Only, all employees will list.

## Employee Affordability

Show Exceptions Only

Drag a column header here to group by that column

| Company | ID  | First | Mid. | Last  | Division    | Depar...  | Fed. Taxable | 9.5% of Taxable | Low Cost | Difference |
|---------|-----|-------|------|-------|-------------|-----------|--------------|-----------------|----------|------------|
| >       | 119 | 674   | John | Smith | 0 - Default | 900 - ... | 8475.00      | 805.1           | .00      | .0         |
|         | 119 | 694   | Jane | Smith | 0 - Default | 300 - ... | 2326.16      | 221.0           | .00      | .0         |
|         | 119 | 1850  | John | Smith | 0 - Default | 700 - ... | 1338.15      | 127.1           | .00      | .0         |
|         | 119 | 2429  | Jane | Smith | 0 - Default | 700 - ... | 484.90       | 46.1            | .00      | .0         |
|         | 119 | 2442  | John | Smith | 0 - Default | 600 - ... | 758.51       | 72.1            | .00      | .0         |
|         | 119 | 2493  | Jane | Smith | 0 - Default | 800 - ... | 1644.22      | 156.2           | .00      | .0         |
|         | 119 | 2781  | John | Smith | 0 - Default | 300 - ... | 1997.94      | 189.8           | .00      | .0         |
|         | 119 | 2800  | Jane | Smith | 0 - Default | 400 - ... | 1223.51      | 116.2           | .00      | .0         |
|         | 119 | 2869  | John | Smith | 0 - Default | 300 - ... | 574.98       | 54.6            | .00      | .0         |
|         | 119 | 2935  | Jane | Smith | 0 - Default | 800 - ... | 806.61       | 76.6            | .00      | .0         |
|         | 119 | 3005  | John | Smith | 0 - Default | 800 - ... | 575.27       | 54.7            | .00      | .0         |
|         | 119 | 3023  | Jane | Smith | 0 - Default | 300 - ... | 555.74       | 52.8            | .00      | .0         |
|         | 119 | 3214  | John | Smith | 0 - Default | 300 - ... | 827.91       | 78.7            | .00      | .0         |
|         | 119 | 3268  | Jane | Smith | 0 - Default | 300 - ... | 578.87       | 55.0            | .00      | .0         |
|         | 119 | 3285  | John | Smith | 0 - Default | 800 - ... | 703.05       | 66.8            | .00      | .0         |
|         | 119 | 3365  | Jane | Smith | 0 - Default | 400 - ... | 518.84       | 49.3            | .00      | .0         |

## Initial Assessment

This screen will show all employees in their initial assessment period. The company will need to be setup to use initial assessment periods and the employee must have an initial assessment event. This screen is to assist in tracking those in their initial assessment period. It will list employees in descending order based on the end date of their assessment period.

## Utilities

 Recalculate Figures

 Preview 1094C

 Change Lookback

 Preview 1095C

 Fill in prior information

 Check All Companies

Actions

## Recalculate Figures

 Please Wait  
Calculating Totals ...

Initiates a re-calculation process after any changes made to ACA related settings. After re-calculation, the Dashboard will be updated.

## Change Look-back



Modify the look-back period for the selected client.

DateChange

Starting Date: 7/1/2014

Ending Date: 12/31/2014

Change

## Fill in prior information



Proceed

This procedure will fill in the events for initial assessment period and benefits eligibility dates if the appropriate information is in the ACA setup for the company. Continue with this action?

OK Cancel

## Preview 1094C



ACA Reporting Year

Select Report Year: 2014

Ok

Preview

Open Save Print Quick Print Options Parameters Margins Orientation Scale Size Find Bookmarks Navigation Zoom Page Color Watermark Export Close

Form **1094-C** Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns

Department of the Treasury Internal Revenue Service

Information about Form 1094-C and its separate instructions is at [www.irs.gov/1094c](http://www.irs.gov/1094c).

OMB No. 1545-2251

**2014**

**Part I Applicable Large Employer Member (ALE Member)**

|   |   |
|---|---|
| 1 Name of ALE Member (Employer)                             | 2 Employer identification number (EIN)  |
| 3 Street address (including room or suite no.)<br>Lane      |   |
| 4 City or town  | 5 State or province<br>TX               |
| 6 Country and ZIP or foreign postal code                    |   |
| 7 Name of person to contact                                 | 8 Contact telephone number<br>( ) - -   |
| 9 Name of Designated Government Entity (only if applicable) | 10 Employer identification number (EIN) |

Page 1 of 3 100%

## Preview 1095C



ACA Reporting Year

Select Report Year:

Ok

Preview

Open Save Print Quick Print Options Parameters Header/Footer Scale Margins Orientation Size Find Bookmarks First Page Next Page Last Page Previous Page Many Pages Zoom Zoom Out Zoom In Page Color Watermark Page Background Export Close

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/1095c](http://www.irs.gov/1095c).

VOID  
 CORRECTED

OMB No. 1545-2251  
**2014**

| Part I Employee                                   |                                | Applicable Large Employer Member (Employer) |  |                             |   |     |     |      |      |     |      |     |     |     |
|---|--------------------------------|---|--|-----------------------------|---|-----|-----|------|------|-----|------|-----|-----|-----|
| 1 Name of employee                                | 2 Social security number (SSN) | 7 Name of employer                          | 8 Employer identification number (EIN)         |                             |   |     |     |      |      |     |      |     |     |     |
| 3 Street address (including apartment no.)        |                                |   | 9 Street address (including room or suite no.) | 10 Contact telephone number |   |     |     |      |      |     |      |     |     |     |
| 4 City or town                                    | 5 State or province<br>TX      | 6 Country and ZIP or foreign postal code    | 11 City or town                                | 12 State or province<br>TX  | 13 Country and ZIP or foreign postal code |     |     |      |      |     |      |     |     |     |
| Part II Employee Offer and Coverage               |                                | All 12 Months                               | Jan  | Feb                         | Mar                                       | Apr | May | June | July | Aug | Sept | Oct | Nov | Dec |
| 14 Offer of Coverage (enter required code)        | 1H                             |   |  |                             |   |     |     |      |      |     |      |     |     |     |
| 15 Employee Share of Lowest Cost Monthly Premium. |                                |   |  |                             |   |     |     |      |      |     |      |     |     |     |

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## Check All Companies



Warning

This process may take several hours. Do you wish to continue?

This feature is only available within the Execupay Payroll Suite for use by Payroll Service Bureaus. Use the feature with caution, as the duration of the procedure is dependent upon client and employee count within the full database of active clients.

## Q & A

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**Q:** *How do I setup ACA for the employee who has no cost because the employer pays the entire cost of the employee only option?*

**A:** There are a few options to handle this case. The first is using memos and deductions. A deduction with a \$0 amount can be setup for the employees. This will be seen as the employee being enrolled in health insurance. A memo can be used in a similar way. In this case, it can be a \$0 memo or the employer cost as the memo won't affect the check. The second option is to use events. The event ACA Benefits eligibility can be setup for the employee. This event means the employee is eligible and was offered coverage. Just fill in the appropriate start and end dates. If there are many employees that may be affected, the benefits rule can be setup on the company level. This will automatically setup the benefit event for all new employees.

**Q:** *What if the employee opts out of coverage?*

**A:** If the employee opts out of coverage for the year, setup the event ACA Declined Coverage and put in the appropriate dates. This will ensure the report shows the employee was offered coverage.

**Q:** *Do I need to use to ACA Benefits and the ACA Initial Assessment rules for all companies?*

**A:** No. These only need to be used if the company uses the initial assessment or needs the benefit rule setup in the cases mentioned in the previous questions.

**Q:** *Why are the employees in the initial assessment period not showing up in the employee classification, employee coverage and employee affordability screens?*

**A:** The employee will show only in the initial assessment screen until they have reached the end of the period. Then they will automatically be put in the other screens. This is because these employees do not need to be in the ACA calculations until they reach the end of the assessment period.

**Q:** *Where can I find the instructions for the 1094-C and 1095-C?*

**A:** The current link for the 2014 report is below. Please note this may change in time.  
<http://www.irs.gov/instructions/i109495c/ar01.html>

**Q:** *What is the calculation the system uses for the average hours?*

**A:** The calculation is as follows. It first figures out the number of weeks in the lookback period on the top on the ACA monitor. This is usually the same as the measurement period. It can be changed however if needed. Once it has the number of weeks, it gets the total number of hours for the employee in that lookback period. It then divides the hours by the weeks. This is the average hours displayed.