PLANSOURCE

Are You Ready for ACA?

STEPS TO TAKE TODAY TO PREPARE

2020 REPORTING

WILL THE WEBINAR BE RECORDED?

Yes! We'll send you a link to the on-demand recording and slides next week.

CAN I ASK QUESTIONS?

Yes! Type your question into the 'Questions' tab of your GoToWebinar panel, we'll follow up with all questions individually after the webinar

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TODAY'S SPEAKERS

Rick Freeman
Director, Customer Support

Chris Mumby
ACA Team Lead

TODAY'S AGENDA

ACA Ongoing Checklist

ACA Timeline

Furlough

Penalty Report Review
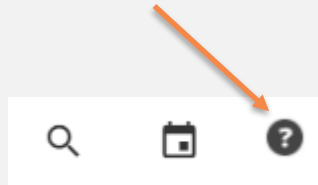
ACA Form Management

Printing & Distribution Service

ACA Ongoing Checklist

How to be Prepared for Reporting Season TODAY

ACA Ongoing Checklist

Where to find it?

ACA Ongoing Checklist
Review the items below to ensure you are on track:

Per Pay Period Checklist Items

☐ Be sure all employees are loaded. This includes any terminated employees and those who are not benefits eligible. Additional information on loading ACA Data can be found in GuideMe, ACA Ongoing Checklist> ACA Administration Guide - ACA Manual Import Worksheets section.

☐ Review employee names and SSNs for accuracy and make corrections as needed to employee records to prevent errors upon transmission to the IRS. If your medical plan(s) is self-insured, review dependent and spouse information, as well.

☐ Confirm all payroll hours are loaded for variable hour and/or part-time employees. Please note that if you are retroactively loading hours, there may be additional processing required to accurately manage the final measurement.

☐ Review the ACA Calculation and Monitoring Reports.

- Calculation errors will show in the most recent ACA Calculation Report, tickets menu by searching for ACA Calculation Report. Instructions to view the ACA Calculation Report may be found in GuideMe, ACA Ongoing Checklist> ACA Calculation Report

- Required offers of coverage due to measurement and potential penalties may be reviewed using the ACA Monitoring Report in the Report Center. The steps to run an ACA Monitoring Report can be found in GuideMe, ACA Ongoing Checklist> Running an ACA Monitoring Report.

- Review offers of coverage and enrollment data to ensure accuracy. Steps to review offers may be found in GuideMe>ACA Ongoing Checklist> Review Medical Offers. Review GuideMe>ACA Ongoing Checklist> ACA – Process to Review Medical Offers for additional information.

ACA ONGOING CHECKLIST

Located in GuideMe with walk throughs and documents that will assist with Broker/Client readiness through the year

ACA Ongoing Checklist

What to do every pay period

Load all employees, including terminated employees and those who are not benefits eligible

Confirm all payroll hours are loaded for variable hour and/or part-time employees

Review employee and dependent names, addresses and SSNs for accuracy

Review the ACA Calculation error report Monitoring report and potential penalty information.

Calculation errors will show in the most recent ACA Calculation Report if any exist. This report includes classification changes which are NOT errors, just notifications.

Required offers of coverage due to measurement and the Potential Penalties reports should be reviewed regularly using the ACA Monitoring Report found in Reports under the Data & Tools section

Review offers of coverage and enrollment data to ensure accuracy and approve offers of coverage when employees made no election

ACA Ongoing Checklist

What to do every quarter

Confirm current FEIN(s) information is accurate

Report any FEIN additions or terminations

For self-insured medical plans, review employees and their dependents to ensure accuracy

ACA Ongoing Checklist

Year-end items

SAFE HARBOR

Upload Pay Rate or W-2 Box 1 Safe Harbor data

FORM MANAGEMENT

Review forms and potential penalties for accuracy & approval

FULFILLMENT

Opt-in for printing and distribution service

IRS TRANSMISSION

Transmit approved forms to the IRS

ACA Timeline

A two-year graphic display of ACA data that impacts
the employee and the 1095-C coding

ACA Timeline

Top section is for employment and measurement

Lower section is for form details, offers and classifications

Subscriber: Jess Alexander FEIN: DIVA ▾ ☐ UnMask SSN

	2018												2019											
<	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	>

Full Time Status
Full Time (FT/PT) — FT

Employment [+add]
Employment (NEW/CONT) — NEW

Monthly Measurement [+add]

Look Back Measurement [+add]
FT
40.0 | FT
40.0
0.0

Hide Details

1095-C
Monthly Wage
Per Capita Penalty
Line 14
Line 15
Line 16

										250	250
1E	1E	1E	1E	1E	1E	1E	1E	1E	1E	1H	1H
0	0	0	0	0	0	0	0	0	0		
2C	2C	2C	2C	2C	2C	2C	2C	2C	2C		

Download 2019 1095-C Form
W2: 3,333.33

Offer and Enrollment [+add]
O:OE
E:OE

Safe Harbor Values [+add]
Org: W2 — 40,000.00

Classification [+add]
Expected Full Time (YES/NO) — YES | NO
Seasonal (YES/NO) — NO | NO
In Multi-Employer Plan (YES/NO) — NO | NO
Hours (WEEK/DAY/ACTUAL) — WEEK | ACTUAL

Hours
Bi-Monthly Hours — 7429

ACA Timeline

What important details do we see on this page for 2019?

ACA Timeline

What important details do we see on this page for 2019?

Potential penalties

ACA Timeline

What important details do we see on this page for 2019?

ACA Timeline

Why do we have penalties?

ACA Timeline

Why do we have penalties?

ACA Timeline

What about 2020?

ACA Timeline

Employee is still benefit eligible for 2020 due to the 40 hour average in 2019.
Measurement for the change in November will not impact FT status until 2021.

Furlough

How to manage measurement with furloughs

Furlough Review

What Do Furloughs Impact?

EMPLOYMENT

If the employee is not terminated, then the period is calculated for measurement which will greatly impact future stabilities

POSITION

Part-time employees will reflect zero hours during furlough and full-time employees will reflect zero hours unless using weekly equivalency

WEEKLY EQUIVALENCY

Full-time employees using weekly equivalency will still have a 40-hour average during furlough since this calculation is automatic

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Furlough Review

What Options Are There?

- Leave hours as is and be aware of the impact

- Adjust employee classifications to remove weekly equivalency for the period where they were on furlough to not assume a 40 hour average

- Use Special Unpaid to ignore the period on furlough and only calculate average hours while still working

Furlough Review

Adjust Employees on Weekly Equivalency

This is not something that has to be done if you want the employee to reflect they are full-time, even if they had furlough. If this is not preferred, updates can be made to Classifications to show the period on furlough, so the employee does not have weekly equivalency.

Furlough Review

Adjust Employees Not on Weekly Equivalency

These employees will have zero hours during furlough and will reduce their measurement. Adjustments may be made so the furlough will not impact their measurements. This can be done by using Special Unpaid.

Furlough Review

What is Special Unpaid?

Special Unpaid is used for IRS regulated leaves that are not to impact ACA measurements. There are 3 different types:

- Military Leave

- Jury Duty

- FMLA

Furlough Review

What Does Special Unpaid Change?

Special Unpaid is an option when entering payroll data.

- Can be entered in hours or days.

- Hours will be counted as normal hours as if paid hours.

- Days will reduce the number of days used when dividing the average hours worked per week.

    - This is used considering a 5 day work week, so only 5 rather than 7 days are entered per week for Special Unpaid.

Penalty Report Review

How to Review and Correct the Most Common Penalty Issues

Penalty Report Review

ACA Monitoring Report: 1095-C Penalties

The ACA Monitoring Report's 1095-C Penalties tab is useful in identifying employees reflecting "potential" penalties based on the information loaded into the system.

It is recommended that this information is reviewed throughout the reporting year, and especially prior to transmitting, as that is the time to finalize 1094(5)-C forms for the IRS.

Penalty Report Review

ACA Monitoring Report: 1095-C Penalties

When creating the report, the type of penalty included may be chosen from the drop-down menu, while it will default to show all types.

2019 1095-C Forms with Penalties

This tab shows any form with a 1095-C penalty
Until 2019 is complete, penalty reporting will lag 1 full calendar month behind to ensure measurement and offers are in place
example: If today is 6/15/2019, the last month shown will be April

COLOR EXPLANATION:

Red	Penalty detected in this month for the subscriber within the 1095-C form

REPORTING OPTIONS SELECTED:
Reporting Year = 2020
Penalty = All
FEIN = All
Measurement Type = Look Back, Monthly
Only Include Forms with Penalties

Employee						FEIN		2019 Penalties								
First Name	Last Name	SSN	Hire Date	Termination Date	Expected FT	Name	FEIN	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
TEST1	TEST	xxx-xx-xxxx	05/25/1992		No	FEIN	xx-xxxxxxx	Unaffordable	Unaffordable	Unaffordable	No 1094C MEC	No Offer	No Offer	No Offer	No Offer	No 1094C MEC
TEST2	TEST	xxx-xx-xxxx	05/26/1992		No	FEIN	xx-xxxxxxx	Unaffordable	Unaffordable	Unaffordable	No 1094C MEC	Unaffordable	Unaffordable	Unaffordable	Unaffordable	No 1094C MEC
TEST3	TEST	xxx-xx-xxxx	05/27/1992		No	FEIN	xx-xxxxxxx	No Offer	No Offer	No Offer	No 1094C MEC	Unaffordable	Unaffordable	No Offer	No Offer	No 1094C MEC
TEST4	TEST	xxx-xx-xxxx	05/28/1992	09/22/2020	No	FEIN	xx-xxxxxxx	Bad Tier	Bad Tier	Bad Tier	No 1094C MEC	Not MV	Not MV	Not MV	Not MV	No 1094C MEC

Employee						FEIN	
First Name	Last Name	SSN	Hire Date	Termination Date	Expected FT	Name	FEIN
TEST1	TEST	xxx-xx-xxxx	05/25/1992		No	FEIN	xx-xxxxxxx
TEST2	TEST	xxx-xx-xxxx	05/26/1992		No	FEIN	xx-xxxxxxx
TEST3	TEST	xxx-xx-xxxx	05/27/1992		No	FEIN	xx-xxxxxxx
TEST4	TEST	xxx-xx-xxxx	05/28/1992	09/22/2020	No	FEIN	xx-xxxxxxx

2019 Penalties								
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Unaffordable	Unaffordable	Unaffordable	No 1094C MEC	No Offer	No Offer	No Offer	No Offer	No 1094C MEC
Unaffordable	Unaffordable	Unaffordable	No 1094C MEC	Unaffordable	Unaffordable	Unaffordable	Unaffordable	No 1094C MEC
No Offer	No Offer	No Offer	No 1094C MEC	Unaffordable	Unaffordable	No Offer	No Offer	No 1094C MEC
Bad Tier	Bad Tier	Bad Tier	No 1094C MEC	Not MV	Not MV	Not MV	Not MV	No 1094C MEC

ACA MONITORING REPORT: 1095-C PENALTIES REPORT OVERVIEW

There are 2 sections in the Penalties report:

Employee details

Penalty Types

No Offer

A required offer was not provided to an employee that had ACA full-time status

No Offer

Not Accepted Offer Showing

If an eligible offer is reflected in the system, but the employee made no election to either enroll or decline coverage, the offer will show as "Not Accepted."

If the offer had been provided to the employee, update this offer by changing the status to "Manually Accepted".

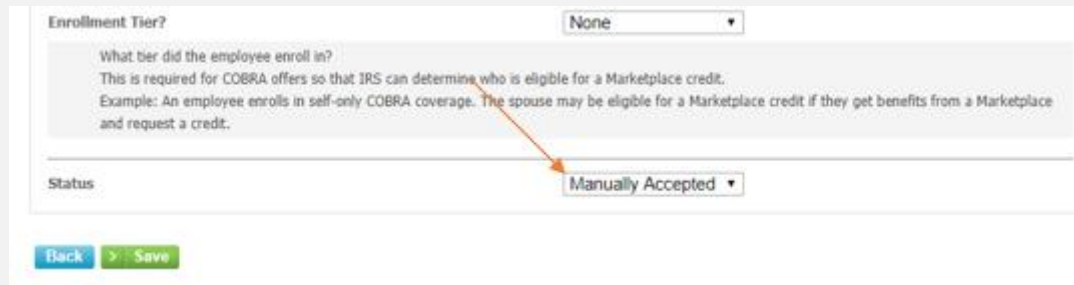# NOT ACCEPTED OFFER SHOWING: PENALTY CORRECTION

Select either Edit in the offer information on the ACA Employee Data screen or select the offer showing on the ACA Timeline.

Typically, the ACA Timeline is the best choice for reviewing penalty data as this page also includes the 1095-C form data.

No Offer

Not Accepted Offer Showing: Penalty Correction

The ACA Offer of Coverage & Enrollment screen would then populate. Verify the details of the offer for accuracy and then select "Manually Accepted" from the drop-down menu and save.

Complete the ACA Calculation to remove the penalty.

No Offer

Not Accepted Offer Showing: Penalty Correction

The nightly ACA Calculation will update the coding on the 1095-C form, but for immediate results, the ACA Calculation can run on the employee to see the 1H/No Offer penalties be replaced with the offer information in lines 14/15 and the Safe Harbor relief code in line 16 if no other penalties apply.

Before | After

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No Offer

Not Accepted Offer Showing: Penalty Correction

If there are many employees listed in the penalty report with No Offer penalties, then it is likely that they did not make an election. The offers can be approved from the Medical Offers screen. Remember, when approving these offers in mass, the person approving them is validating all selected offers were provided to the employees.

No Offer

Not Accepted Offer Showing: Penalty Correction

By selecting Search, all unapproved eligible offers will remain for validation. To apply the approval to all, select Apply Action to all records found and the Accept button.

Medical Offers ❓

☐ **Apply Action to all 3 records found**

☐	Employee	★ Origin	Plan Name	Offer Starts On	Offer Ends On	Enrollment Starts On	Enrollment Ends On	❓ Approval	Eligible For Offer	Offer Calc Date	Max Tier Offered	Self-Only Employee Share	Provides Minimum Value?	Is MEC?	Manual	Last Update
☐	Ababwa, Ali	New Hire	WEST Kaiser Ded HMO 3500 + Difference Card	09/12/2019	10/31/2019			Not Accepted	Yes	09/12/2019	ALL	0.0	Yes	Yes	No	09/12/2019 by Stewart, Matt
☐	LaForge, Geordi	New Hire	WEST Kaiser Ded HMO 3500 + Difference Card	09/12/2019	10/31/2019			Not Accepted	Yes	09/12/2019	ALL	0.0	Yes	Yes	No	09/12/2019 by Stewart, Matthew
☐	Test, LNP	New Hire	WEST Kaiser Ded HMO 3500 + Difference Card	07/15/2019	08/31/2019			Not Accepted	Yes	07/15/2019	ALL	0.0	Yes	Yes	Yes	09/19/2019 by Stewart, Matthew

❓ **Accept** **Reject**

❓ **Delete**

☐ **UnMask SSN**

Export Offer Data to Excel

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No Offer

No Offer Showing

Offers may not show if a life event was not processed for the offer to be created. An example would be, if someone changed the eligibility start date without a life event. This would not reflect an offer to show for ACA without an event. This is also bad because any previous offers may not be recognized anymore.

There are 3 reasons an offer will be automatically created:

1. New Hire Event
2. Open Enrollment
3. Life Event

It is possible that an offer really wasn't provided, and there is a legitimate penalty.

Missing offers can also happen if the population eligibilities for the plans or costs are not set up correctly to include all of the eligible employees. If the populations are found to be incorrect, it is likely there are other employees missing offers. Contact the Service Team or your Account Manager for population corrections.

No Offer

No Offer Showing: Penalty Correction

In the instance that an offer was given, but was not reflected in the system, an offer may be manually created by clicking the [+add] link after Offer and Enrollment on the ACA Timeline.

NO OFFER SHOWING: PENALTY CORRECTION

Complete the fields for the offer provided. Keep the in-line help open as it provides helpful explanations on what the values are and how to complete each section.

The offer could then be Manually Accepted as a provided offer and Saved.

No 1094C MEC

(Formerly displayed as Not MV)

The requirement of 95% of all full-time status employees was not met and more than 5 employees have missing offers

No 1094C MEC

Not Meeting 95% MEC

If there are many penalties on the Monitoring report listed, it is likely that this penalty may apply.

If at least 95% of all full-time status employees are not offered MEC coverage when required, all full-time status employees that are not enrolled in coverage will have potential penalties.

No 1094C MEC

Not Meeting 95% MEC: Penalty Correction

If the penalty report is showing No 1094C MEC for almost everyone in an FEIN for one or more months, then they may not be meeting the 95% MEC offer requirement for those months. This can be verified by going to the ACA Forms Management Review tab and select Edit for the FEIN in question.

ACA Form Management

Review	Approve	Produce	Transmit	Correct	Unapprove

	ALE Control Group			Forms
	ALE Member Name	FEIN	Control Group	1094-C
☐	DIVA	123456789	Mountain Creek1	edit
☐	DIVB	223456789	Mountain Creek	edit
☐	DIVC	333456789	Mountain Creek	edit

No 1094C MEC

Not Meeting 95% MEC: Penalty Correction

When any of the months are unchecked in column (a) MEC (Minimum Essential Coverage) Offer Indicator, then this means more than 5 full-time employees and more than 5% of the full-time employees have No Offer penalties.

Refer to the No Offer section for how to review and correct these penalties to meet the 95% Requirement. Once 95% or more of the employees are offered MEC coverage, the No 1094C MEC penalties will fall off the other employees.

	(a) MEC Offer Indicator	(b) FTE Count for ALE Member	(c) Total Employee Count for ALE Member	(d) Aggregated Group Indicator	(e) Section 4980H Transition Relief Indicator
All 12 months	☐			☐	
January	☐	10	482	☐	
February	☐	11	491	☐	
March	☐	9	493	☐	
April	☐	9	501	☐	
May	☐	10	505	☐	
June	☐	10	506	☐	
July	☑	0	505	☐	
August	☑	0	505	☐	
September	☑	0	508	☐	
October	☑	0	507	☐	
November	☑	0	508	☐	
December	☑	0	508	☐	

Not MV or Bad Tier

A required offer was not provided that gave (Minimum Value) coverage to an employee/ A required offer was not provided that included proper dependent coverage for an employee

Benefit Plan Error: Penalty Correction

NOT MV

A Not MV penalty would indicate on the penalty report that the offer provided was not of minimum value according to ACA standards. This could be a true penalty, but it is likely either there is an issue with the plan design or the offer was manually created incorrectly.

Review the offer provided and verify if it is manual. If it is, update accordingly, if not, contact the Service Team or Account Manager.

BAD TIER

A Bad Tier would be indicated on the penalty report if the Tier is not set properly in the plan design. For example: if the coverage level is listed as employee only, this would reflect a penalty as the dependents/children must always have coverage offered and the spouse if no other coverages were available.

Review the offer provided and verify if it is manual. If it is, update accordingly, if not, contact the Service Team or Account Manager.

Not MV OR Bad Tier

Manual Offer: Penalty Correction

To review if an offer is manual, locate the offer for the employee from the ACA Timeline screen.

Select the offer directly below the penalized month(s) shown on the Penalty Report which will correspond with the months on the ACA timeline as pink.

After you open the offer you can find if the status is Manually Accepted which is also the status when manually created. If it is, look up at the Tier or Is Minimum Value and edit to correct if the offers were provided with proper Tier and Minimum Value plans.

Unaffordable

A required offer was not provided that was affordable for an employee

Unaffordable

Missing Safe Harbors

There are 3 different Safe Harbors used to calculate affordability:

1. Pay Rate
2. W2 box 1
3. Poverty

Typically, the unaffordable penalty will be showing when the Safe Harbor value for the Pay Rate or W2 box 1 has not been entered for the employees. The Poverty Level Safe Harbor is dictated by the IRS each year and is not adjustable, so no entry is necessary. The Pay Rate and W2 Safe Harbors are reliant on an import worksheet. This means that in addition to reviewing the medical offer information for accuracy, the Safe Harbor values should also be imported and reviewed when addressing Unaffordable potential penalties.

Unaffordable

Missing Safe Harbors: Penalty Correction

The Safe Harbor Import Worksheets can be found on the Data screen, as seen below, and can be used for uploading employees' Safe Harbor information in bulk.
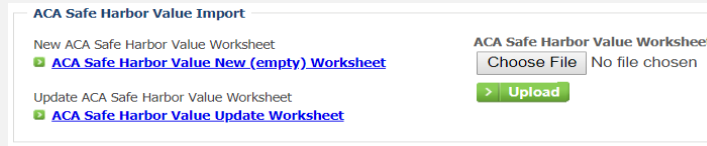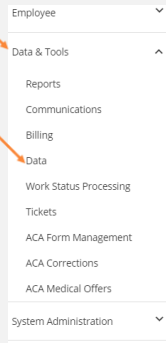
The **ACA Safe Harbor Value New (empty) Worksheet** should be utilized when loading for employees that do not already have an entry for the reporting year. The **ACA Safe Harbor Value Update Worksheet** would be used for making adjustments to existing records. If more than one entry is loaded in the system for the same year, the calculation may use an incorrect value for the Safe Harbor.

Unaffordable

Missing Safe Harbors: Penalty Correction

If the Safe Harbor Values are not loaded for an employee, the ACA Timeline will be empty where the entry is required.

Unaffordable

Missing Safe Harbors: Penalty Correction

Safe Harbor values can be loaded for the individual employee on the ACA Employee Data screen or the ACA Timeline.

Enter the correct calendar year, FEIN for the entry, which safe harbor used and the value.

Unaffordable

Configuration Error: Penalties Correction

If all of the safe harbor values have been loaded and there are still many unaffordable penalties, changing the elected safe harbor may need to be considered. It is possible that there is an error in the cost or eligibility configuration.

Remember, the lowest cost eligible plan for "Employee Only" coverage is used to calculate affordability and will reflect the monthly cost on line 15 of the 1095-C form.

If these values are not correct, please reach out to the Service Team or your Account Manager for any changes to the cost, eligibility, or safe harbor elections.

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Penalty Report Review Summary

PENALTY TYPE	PENALTY MEANING	PENALTY REASONS
NO OFFER	A required offer was not provided to an employee that had ACA full time status	• Not Accepted • No Offer Showing • Many with No Offer Showing
NO 1094C MEC	A requirement of 95% of all full-time status employees was not met and more than 5 employees have missing offers	• Not Approving Offers • Not Meeting 95% MEC
NOT MV	A required offer was not provided that gave (Minimum Value) coverage to an employee	• Manually Created Offers Incorrectly • Benefit Plan Errors
BAD TIER	A required offer was not provided that included proper dependent coverage for an employee	• Manually Created Offers Incorrectly • Benefit Plan Errors
UNAFFORDABLE	A required offer was not provided that was affordable for an employee	• Missing Safe Harbors • Configuration Error • Unaffordable plans

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ACA Form Management

IRS Forms

REVIEW

Each tab is strategically ordered in the steps that would be completed for reporting.

The Review tab is where all of the 1095-C forms can be created in a PDF or worksheet for review. The forms will show a draft watermark until approved.

APPROVE

Approving forms will lock them from any changes unless unlocked for correction or unapproved. Forms are only able to be approved by the selected approval person. Each tab will have limited options for others that have not been given that privilege. The person that approved will be displayed in the Approval section.

If 1095-C Online For Employees is Yes, then they are given access to an email notification. If this is preferred, be sure to check the box to activate the email for subscribers to be notified. After approval has completed the forms will be available for download and employees will be able to opt out of paper forms.

ACA Form Management

| | Review | Approve | Produce | Transmit | Correct | | Unapprove |

Fulfillment enabled

	ALE Control Group			Needs Mailed			
ALE Member Name	FEIN	Control Group	Pending	Mailed	Deleted	Status	
Sutter Cane Productions	444444444	Matt's Plats	81	0	0	Not Approved	
TraceBusterBuster, Inc.	222222222	Matt's Plats	27	0	0	Not Approved	
Matt's Plats	111111111	Matt's Plats	37	0	0	Not Approved	

1095-C MAILING
To produce 1095-C forms, select the FEINs you want to include and submit a job.
When this job is complete it will create a ticket with the bulk mailing file attached to it.
Note: Because this is for mailing, it will not include 1094-C forms.

Mailing 1095-C forms to employees is the responsibility of the employer.

*Format:	PDF
*Forms per bulk PDF:	5000
*Employees:	Employees who want a paper form
*Include previously mailed forms:	No
Population:	- No Population -
*Tentative Mail Date:	
UnMask SSN:	
Job Email:	chris.mumby@plansource.com

Submit Form Creation Job

Once forms are created the status will move from pending to mailed.

Forms creation options:
1 — All employees
2 — Employees who want to receive paper forms
3 — Employees who have not elected to receive paper forms

PRODUCE

The checkboxes will not appear here until the forms have been approved. If you see Fulfillment enabled, PlanSource will be completing the mailing of the forms.

TRANSMIT

Only the designated approver can complete and transmit the forms to the IRS. A ticket will be created and include a detailed summary of the transmission.

This tab will display the status of the forms for pending, processing, completed, rejected or sent back for corrections. Make sure to refer back to this page after transmitting to verify all forms are Complete.

| | Review | Approve | Produce | Transmit | Correct | | | Unapprove |

Fulfillment enabled

	ALE Control Group			Corrections		Mailing		Notifications (Online 1095-C)	
	ALE Member Name	FEIN	Control Group	1094-C	1095-C	Pending	Mailed	Pending	Notified
	Sutter Cane Productions	444444444	Matt's Plats	1	11	0	1	0	0
	TraceBusterBuster, Inc.	222222222	Matt's Plats	0	0	0	0	0	0
	Matt's Plats	111111111	Matt's Plats	1	23	0	0	0	0

1095-C CORRECTION MAILING
To produce corrected 1095-C forms, select the FEINs you want to include and submit a job.
When this job is complete it will create a ticket with the bulk mailing file attached to it.
Note: Because this is for mailing, it will not include 1094-C forms.

*Format:	PDF
*Forms per bulk PDF:	6000
*Employees:	Employees who want a paper form
*Include previously mailed forms:	No
Population:	- No Population -
*Tentative Mail Date:	
UnMask SSN:	
Job Email:	no-reply@plansource.com

Submit Form Creation Job

1095-C CORRECTION NOTIFICATION
Select the FEINs you want to include and submit a job.
This will email the selected employees letting them know their corrected 1095-C form is available online.

*Employees:	Employees who don't want a paper form
*Include previously notified forms:	No
Population:	- No Population -
*From Address:	chris.mumby@plansource.com
*Email Subject:	1095-C Corrected Form Available
*Email Message:	A Correction to your IRS 1095-C form is available for download.
*Signature:	Your Benefits Manager

Submit Notification Job

CORRECT

Corrected forms can be tracked and created from this tab.

The forms can be created by PDF or sent to your employees via email if they have chosen to opt out of the paper form and receive it electronically.

UNAPPROVE

It is not recommended to ever Unapprove forms unless consulting with the Service Team or Account Manager.

By unapproving the forms it removes all history and will have an impact to the IRS form transmission.

ACA FORM MANAGEMENT

TAB	FUNCTION
REVIEW	• Create drafts in PDF or Excel of 1094C and 1095C forms • Edit 1094C forms
APPROVE	• Processes and tracks the approval of 1094C and 1095C forms • Locks all forms after approval • Only can be completed by approval person(s)
PRODUCE	• Creates forms to be mailed to EE's and Excel option for labeling • Tracks the production of mailed forms for auditing purposes
TRANSMIT	• Tracks progress of Transmission • Tracks Corrections/Rejections/Completions
CORRECT	• Tracks the number of forms needing correction • Produces only the corrected forms for mail or email
UNAPPROVE	• Unapproves and unlocks all 1094C and 1095C form • Should only be completed after reviewed with the ACA Support Team

ACA State Transmission

If using us for state transmission filing, there is a separate approval process that will be available once there is a successful transmission to the IRS. Selecting the link will bring you to the ACA State Transmissions page.

ACA State Transmission

Following the successful IRS transmission, the ACA State Transmission screen can be used to approve forms for state filing. See PlanSource University for a complete guide on State Transmissions.

ACA Printing & Distribution Service

We can print and distribute the forms to your employees

1095-C Printing and Distribution Service

You must Opt-in for Printing and Distribution Service

https://plansource.com/products/aca-compliance/fulfillment/

1. Complete the form on the link above
2. You will receive an invoice for the fulfillment fee for the total number of 1095-C forms we expect to print and mail
3. Submit your payment
   - $2.50 per form approved 15 days prior to the IRS deadline
   - $3.00 per form approved less than 15 days prior to the IRS deadline
   - *We cannot move your forms to printing and mailing prior to receiving payment*
4. Complete the process to review and approve your 1094(5)-C forms
5. PlanSource will print and distribute your employee forms

ACA FULFILLMENT
2020 Reporting Timeline

2020 Fulfillment
Opt-in Opens

ACA Year Closes
Approval Window Begins

Employee Mailing
Postmark Due Date

Mar 31st

4th Qtr

Jan 1st

Mar 2nd

Fulfillment Request
Invoicing and Payment Begins

Client Payment Processing Period

Late Enrollment
Expedited Pricing Begins*

IRS Reporting Deadline
Complete Transmissions
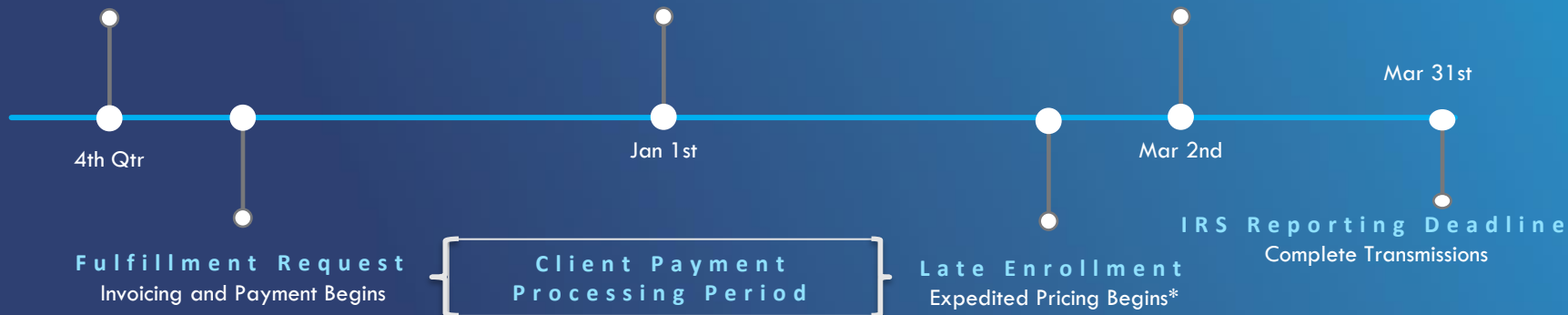
All forms submitted for processing (approval and paid) less than 15 days prior to the IRS Deadline will be subject to a $0.50 per form expedited processing fee

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Finished ACA Reporting

Are You Ready for ACA Summary

SECTION	TOPICS REVIEWED
ACA ONGOING CHECKLIST	• Change ACA Culture to actively review throughout the year • Per Pay Period, Per Month, End of Year • Mastering the Monitoring Report is mastering ACA
ACA TIMELINE	• A 2 year graphic display of employee ACA data and 1095-C • Best place to review and correct employee penalties • Can calculate immediate updates to employees forms
PENALTY REPORT REVIEW	• Reviews Monitoring Report creation and different penalty definitions • Includes the most common penalty reasons and how to correct them
FURLOUGH REVIEW	• Furloughs impact ACA measurements • Adjustments can be made to measurements based on furlough periods • Special Unpaid may be used for hours during furlough
ACA FORM MANAGEMENT	• Tabs are in sequential order to complete transmissions • Only approval person can complete all steps required
ACA FULFILLMENT	• How and where to sign up for PlanSource Fulfillment • Payment and approval is required before service is rendered

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Q&A and Thank you!