würk

ACA Year-End Filing Steps

OVERVIEW

The information below will guide you through the steps to complete ACA Year-End Processing in Wurk.

Before you begin processing, ensure the following are completed:

1. ***ACA Profiles*** are assigned and correctly effective dated.

Initial assignment of ACA Profiles are to be assigned to the 1/1/2012 date line. However, when an employee's Employee Type changes during their tenure (i.e. Full-Time to Part-Time / Part-Time to Full-Time), it's critical they are assigned to a different ACA Profile and it's effective dated according to the date of their Employee Type change.

2. ***Benefit Profiles*** are assigned and correctly effective dated according to the first date the employees' medical benefits would begin.
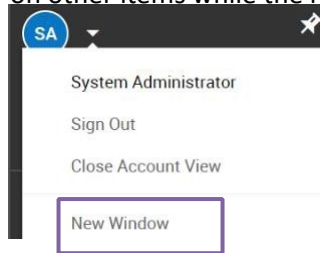
ACA Processing Steps

1. **Recalculate Employee ACA Timelines**
   - Team > Benefits > ACA > Employee ACA Actions
   - Select all employees > click Recalculate (select 2022)

   Recalculating large amounts of employees could take up to 45 minutes
   - ➢ To lessen recalculating time, filter by ACA Profile and recalculate by smaller groups of employees.
   - ➢ While employee timelines are recalculating, you may open another window and continue working on other items while the recalculations are in process.

2. **Locate the *ACA Year-End Processing*** menu item in the hamburger menu Team > Benefits > ACA > ACA Year End Processing

   This Checklist will guide you through the Processing steps to successfully create, populate, finalize, and electronically deliver the 1095-C forms to employees, including creating, populating, and finalizing a 1094-C for each EIN operating within your organization.

   - Click the pencil icon next to a line associated to last year and the company you will process for; all EIN's must be processed separately.

   - If last year was not created, click the "Add Tax Year Entry" button.

2021

   - Once in the Checklist, it will include all steps needed to complete ACA Processing.

- Click through the blue hyperlinks to complete each step; when finished, click "Mark as Complete"

3. Populate 1095-C Forms

An Employer must furnish an **Employee Form 1095-C** for each employee who was a full-time employee of the employer for any month of the calendar year, as defined by the employer's measurement periods.

Note: Forms must be added by clicking "***Mass Add New"*** before clicking "***Mass Populate"***

A	From the Checklist, click **Repopulate 1095-C Forms (Optional)** to create and populate forms 1095-C for employees.	E	Click **Mass View** to open selected forms for editing and review.
B	Click **Add New** or **Mass Add New** to create new forms.	F	Click **Mass Edit** to edit fields for multiple forms using the same values.
C	Click **Mass Populate** to auto-populate values in the selected forms.	G	Click **Back** to return to the checklist.
D	Click the **View Form 1095-C** icon to view an individual form.		

4. Finalize 1095-C Forms

H	From the Checklist, click **Finalize 1095-C Forms** to finalize forms 1095-C for employees.	J	Click **Back** to return to the checklist.
I	Click **Mass Finalize** to finalize the selected forms.		

5. 1095-C Dependent Forms (Optional) – Self-Insured Only

Dependent Forms 1095-C are used for individuals who do not appear in the company, but are still due a Form 1095-C for a self-insured plan. A typical example is a former spouse or just aged dependent child who enrolls in a **self-insured COBRA plan. This will need to be manually populated.**

A	From the Checklist, click **View Dependent Forms 1095-C** to create and populate forms 1095-C for dependents.	**E**	Fill out the remainder of the form details.
B	Click **Add New** to create new forms.	**F**	Click **Finalize Form**
C	Complete the pop-up **1095 Questionnaire Confirmation** fields with the EIN & reason for 1095-C. This will automatically fill out portions the form.	**G**	Click **Back** twice to return to the checklist or add additional 1095-C Dependent forms.
D	Click **OK**.		

Benefits > ACA > ACA Year End Processing

← EIN Name **Year End Process 20xx**

⚠ Incomplete

0%

1095-C Dependent Forms (Optional)

◇ No 1095C Dependent forms have been opened.

View Dependent Forms 1095-C ——— **A**

B

Benefits > ACA > Forms > Dependent Forms 1095-C

← **Dependent Forms 1095-C**   ⤢ | **ADD NEW**

◁ Page 1 of 1 ▷ 0 Rows   Saved: [System] ▾

	Id	▾	Dependent Name	▾	Finalized	▾	Company EIN	▾	Is Corrected	▾	Created
	=	▾	=	▾	All	▾	=	▾	All	▾	=

ⓘ   No Data to Display

6. **Deliver Electronic 1095-C Forms**

   Note: **This step does not need to be completed as part of ACA Processing if you do not want to provide employee's electronic access to their 1095-C or if you want to release at a separate time.**

Wurk will file with the IRS (and applicable states) and all paper forms will be mailed by the federal and state deadlines. Mark your calendar to return to the *ACA Year End Processing* and complete this step to Deliver Electronic Forms at a later time.

A	Click **Share 1095-C forms to employees and send email notifications**.
B	Click **OK**.

Deliver Electronic 1095-C Forms

⚠ There are 8 finalized (not shared) 1095-C forms.
Share 1095-C forms to employees and send email notifications.

Leave this unchecked so all employees have the option to view their 1095-C's only *after* providing their electronic consent in Wurk.

Warning

Do you want to share 1095-C forms to employees and send email notifications?

☐ Send to employees with Electronic Consent only.

Cancel   OK   **B**

7. Populate 1094-C Forms

Employers must create and Populate a 1094-C for each EIN in scope for ACA Filing.   **Note**: Forms must be added by clicking "***Add New"*** before clicking "***Populate"***

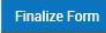|				
A	From the Checklist, click **Repopulate 1094-C Forms (Optional)** to create and populate form 1094-C for your company.	**E**	Click **OK**.
B	Click **Add New** to create a new form.	**F**	Click **Save** after reviewing all form fields.
C	Click **Populate Form** to auto-populate values in the form.	**G**	Click **Download PDF** to save or print a copy of the form.
D	Complete the pop-up **1094 Questionnaire Confirmation** fields. This will automatically fill out the form.	**H**	Click **Back** twice to return to the checklist.

☐ **Repopulate 1094-C Form (Optional)** — A
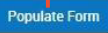
⚠ No 1094-C forms have been opened.
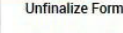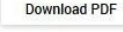
H — ← Form 1094-Cs   **Add New**   **Mass View** — B

Employer Form 1094-C   Saved: [System] ▼

◀ Page [1] of 1 ▶ 1 - 1 of 1 Rows   Selected Year: 2017   ▼ (1) │ Mode: 🗒 ▼ │ •••

☐			Created	Finalized	Company EIN	Company Name
☐	✎	✕	09/20/2018		12-3456789	

F —   C

H — ← 1094-C   **Save**   **Populate Form**   **Finalize Form**   •••

Unfinalize Form

Download PDF — G

Form 1094-C

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

Department of the Treasury
Internal Revenue Service

▶ Go to www.irs.gov/Form1094C for instructions and the latest information.

Part I   Applicable Large Employer Member (ALE Member)

1 Name of ALE Member (Employer)
GKTCS Solutions

2 Employer identification number (EIN)
12-3456789

3 Street address (including room or suite no.)
101 West Washington Street

4 City or town
Indianapolis

5 State or province
IN

6 Country and ZIP or foreign postal code
46204

7 Name of person to contact
Max Blackburn

8 Contact telephone number

9 Name of Designated Government Entity (only if applicable)

10 Employer identification number (EIN)

11 Street address (including room or suite no.)

12 City or town

13 State or province

14 Country and ZIP or foreign postal code

For C

15 Name of person to contact

16 Contact telephone number

17 Reserved . . . .

- Complete the 1094 Questionnaire to populate the form. Please review the IRS Instructions for Forms 1094 & 1095 if you are unsure how to answer the Questionnaire.
- **The only manual adjustment you may need to make is adjusting the form counts in Line 18 & 20 for any Dependent 1095-C that need to be included.**

8.

A	Click **Finalize 1095-C Forms** to finalize forms 1094-C.	**C**	Click **Finalize Form**.
B	Click the **View Form 1094-C** icon to open a form 1094-C.	**D**	Click **Back** twice to return to the checklist.

Finalize 1094-C Forms

9. Update Support Ticket

- **Once ACA Year End Processing has been completed for all EIN's within your company, update the *ACA Processing 20xx* Support Ticket to notify Wurk of completion.**

- Wurk will then pull an XML file and upload to the IRS for e-filing the 1094-C and for 1095-Cs to be distributed via mail.