ACA Year-End Filing

OVERVIEW:

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

Please note that before you begin processing, you should ensure you have reviewed the ACA Audit Reports:

- **Accessing your ACA Audit reports:**
    - Go to My Info > My Reports > My Saved Reports.
        - Select “Others’ Settings”
        - Set Saved as Name to ‘like’ and enter the name of the report in the search bar.
        - Select the blue play button of the desired report to run it.
- **ACA Audit Reports**:
    - ACA Audit – ACA Profile Missing
        - Report showing anyone missing an ACA Profile.
    - Compliance Report
        - Report showing anyone with a compliance alert for the year.
    - ACA Audit – ACA Profile Date Incorrect
        - Report showing anyone that potentially has an incorrect ACA profile effective date.
            - ACA Profiles should always be effective dated on the first of the month.
            - In this report, look for the ACA Profile Effective Date column and review/update anyone that doesn’t have a 1/1, 2/1, 3/1, 4/1, 5/1, 6/1, 7/1, 10/1, 11/1, or 12/1 effective date.
    - ACA Audit – Benefit Profile Date 12/31/1900
        - Report showing anyone that has a 12/31/1900 benefit profile effective date.
            - Benefit Profiles should always be effective dated on the first of the month in which the Employee is offered benefits.
                - EXCEPTION: If you do not have a waiting period for your benefits, this may be left as 12/31/1900

ACA Year-End Processing Steps

1. **Recalculate Employee ACA Timelines if you made any changes in the last month**
   - Team > HR > ACA > Employee ACA Actions
   - Select all employees > click Recalculate (select 2023) ****Recalculating a substantial number 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 under menu Team > HR > ACA > ACA Year End Processing. You will use this checklist to help guide you through the processing steps to create, populate, finalize, and electronically deliver the 1095-C forms to Employees and to create, populate, and finalize a 1094-C for each EIN operating within your organization. **For additional guidance/screenshots of steps 2-6, you can click on the following link: ACA Year-End Filing Tango.

   - If last year was not automatically created, click the "Add Tax Year Entry" button.
   - Click the "pencil icon" next to a line associated to the filing year and the EIN you will process for; note that all EIN's must be processed separately.
   - Once in the Tax year for the individual EIN, click on "Start new filing"
   - Once in the checklist, it will include all steps needed to complete ACA Processing.
   - Click through the blue hyperlinks to complete the steps (see steps 3-6 below for additional information).
   - NOTE: 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.

3. **CHECKLIST STEP: 1095-C - create, populate, and finalize (View employee forms 1095-C)**

   - Click on "View employee forms 1095-C"
   - Click on "Mass Add New"
   - Select "Mass Add for Selected Year" and click "OK"
   - Delete any test or fake accounts if applicable
   - Select "All on Report" and click on "Populate"
   - Select "All on Report" and click on "View Selected" to flip through Employees using the left and right arrows at the top of the page and review as needed
   - Once you have reviewed click on the back arrow next to 1095-C
   - Select "All on Report" and click on "…" next to Populate and select "Finalize"
   - Once all have been finalized, click on the back arrow next to Employee Forms 1095-C
   - Under the Checklist Steps for 1095-C – create, populate, and finalize click on "Mark as Complete"

4. CHECKLIST STEP: 1095-C Dependent - create, populate, and finalize (optional) (View dependent forms 1095-C) to be completed by self-insured or level-funded Clients ONLY. If this does not apply to you, skip this checklist item.

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

- Click on "View dependent forms 1095-C"
- Select "Add New"
- Click on "Populate Form" to populate the Employer portion of the form
- Fill out Parts I, II, and III of the 1095-C manually
- Click on "Save" and then click on "Finalize Form"
- Select the back arrow next to Form 1095-C Dependent
- Repeat steps above until all Dependent Forms have been added
- Click on the back arrow next to Dependent Forms 1095-C
- Under the Checklist Steps for 1095-C Dependent – create, populate, and finalize (optional) click on "Mark as Complete"

5. CHECKLIST STEP: Share forms electronically with active employees (skip this checklist item until after filing).

6. CHECKLIST STEP: 1094-C – create, populate, and finalize (View employer forms 1094-C)

- Click on "View employer forms 1094-C"
- Select "Add New"
- Click on "Populate Form"
- Fill out the questionnaire completely (note that if you have already done this prior it should prepopulate with prior year data). Please review the [IRS Instructions for Forms 1094 & 1095] if you are unsure how to answer the Questionnaire. ALWAYS make sure that "This is the authoritative transmittal for this ALE Member" is checked, when done click on "OK."
- Once the form populates double check to make sure lines 18 and 20 include any added dependent 1095-C forms if applicable
- If you are part of an Aggregated ALE Group, double check that part IV lists all the other applicable ALEs associated with the 1094-C you are populating
- When finished reviewing Click on "Save" and then click on "Finalize Form"
- Select the back arrow next to 1094-C
- Select the back arrow next to Employer Forms 1094-C
- Under the Checklist Steps for 1094-C – create, populate, and finalize click on "Mark as Complete

7. CHECKLIST STEP: Download 1095-C forms, File your ACA forms, and AIR Submission are completed by the Würk Team.

8. Repeat steps 2-6 for each EIN that you will be filing for the year.

9. Update Support Ticket

- Once ACA Year End Processing has been completed for **ALL EINs within your Company for the current filing year**, update the ACA Processing Support Ticket that was created for you by Würk to notify Würk that you are ready for us to file on your behalf.
- Würk will then pull an XML file and upload it to the IRS and applicable States as needed for e-filing and 1095-Cs will be distributed via mail for Employees that are terminated or did not enable Electronic Consent.

10. Würk Team Response to Support Ticket

- Once Würk has filed and received confirmation from the IRS the team will reach out via your Support Ticket to let you know if your filing has been accepted or provide you with any errors that need to be resolved.
- At this time, you will go back to each checklist and for the Checklist Step “Share forms electronically with active employees” select “Share Forms”.