

JD Edwards EnterpriseOne Applications

US Affordable Care Act Year-End Processing Guide

9.2

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Information

For additional information about JD Edwards EnterpriseOne applications, features, content, and training, visit the JD Edwards EnterpriseOne pages on the JD Edwards Resource Library located at:

<http://learnjde.com>

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
<i>Italics</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
Monospace	Monospace type indicates commands within a paragraph, URLs, code examples, text that appears on a screen, or text that you enter.
> Oracle by Example	Indicates a link to an Oracle by Example (OBE). OBEs provide hands-on, step-by-step instructions, including screen captures that guide you through a process using your own environment. Access to OBEs requires a valid Oracle account.

1 Introduction to ACA Health Coverage Information Returns (AIR)

JD Edwards EnterpriseOne US ACA Year-End Processing Overview

This guide describes how to perform year-end tasks for producing ACA Health Coverage Information Returns, including:

- data preparation and setup
- generating and working with reporting information
- printing forms and reports
- electronically filing with the IRS

Oracle JD Edwards enables users to refer to information in the existing Payroll and Human Resources tables to create the data required for ACA reporting.

The Affordable Care Act Health Coverage Information Returns (AIR) presents a unique set of reporting requirements to employers. All Applicable Large Employer Members (ALE Members) should file Forms 1094-C and 1095-C.

Employers with 50 or more full-time employees (including full-time equivalent employees) in the previous year, should use Forms 1094-C and 1095-C to report the information required under sections 6055 and 6056 about offers of health coverage and enrollment in health coverage for their employees.

You can use Form 1095-C to:

- File tax returns by full-time employees.
- Report information about the health insurance coverage offered and any safe harbors or other relief available to the employer, or report that no offer of coverage was made.
- Report enrollment information from employers who offer self-insured plans, and information about employees and individuals who enrolled in minimum essential coverage.
- Help the IRS determine if your organization potentially owes an employer shared responsibility payment to the IRS.
- Help the IRS determine whether your full-time employees and their dependents are eligible for the premium tax credit.

You can use Form 1094-C to:

- File with the IRS as a transmittal document for Forms 1095-C, Employer Provided Health Insurance Offer and Coverage.
- Provide a summary to the IRS of aggregate employer-level data.
- Help the IRS determine whether an employer is subject to an employer shared responsibility payment and the proposed payment amount.

JD Edwards EnterpriseOne US ACA Year-End Processing Implementation

This section lists out the implementation steps for US Year-End ACA Information Returns processing.

When you are planning to implement the US ACA year-end processing, use all sources of information, including the installation guides and troubleshooting information.

When you are determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne ACA year-end processing, use EnterpriseOne Change Assistant. EnterpriseOne Change Assistant is a Java-based tool. It reduces the time that is required to search for and download ESUs by at least 75 percent. The tool also enables you to install multiple ESUs simultaneously.

See *JD Edwards EnterpriseOne Tools Software Updates Guide* .

Implementation Steps for US ACA Year-End processing

This table lists the implementation steps for processing the ACA Information Returns year-end information for the US:

- Install the year-end update. See <http://www.oracle.com/support/contact.html>
- Verify base data setup for AIR year-end processing.
See *Setting Up AIR Year-End Processing*.
- See "Working With Hours of Service Eligibility for the Affordable Care Act" in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide* .
- Set up ALE ID to company cross-reference.
See *Adding JDE Companies to ALE*.
- Generate hours of service report.
See *Generating ACA Hours of Service Report*.
- Verify ACA employee eligibility.
See *Verifying ACA Employee Eligibility*.
- Verify and enroll employee and dependents to benefit plans.
See *Setting Up Benefit Plans and DBAs*.
- Set up employees offer and coverage values for Line 14, 15, and 16.
See *Setting Up Employee Offer and Coverage Values (Line 14-16 of Form 1095-C)*.
- Process periods of employment report.
See *Setting Up Periods of Employment Report (R08118)*.
- Process Hours Worked by Month report.
See *Setting Up Hours Worked by Month Report (R08124)*.

- Set up 1095-C Offer and Coverage workfile.
See *Setting Up AIR Year-End Workfile Parameters*.
- Build the 1095-C Offer and Coverage workfile.
See *Creating the Form 1095-C Workfiles*.
- Build the 1095-C Covered Individuals file.
See *Creating the 1095-C Covered Individuals File Build (R08120) Report*.
- Update 1095-C Offer and Coverage workfile information.
See *Resetting the Form 1095-C Workfiles*.
- Verify 1095-C Offer and Coverage workfile information.
See *Adding or Updating 1095-C Information*.
- Print Form 1095-C.
See *Printing Form 1095-C from the Workbench*.
- Build Form 1094-C HCIR workfile
See *Creating the Form 1094-C Workfile*.
- Select 1094-Cs for transmission and build transmission record
See *Creating and Reviewing Forms 1094-C/1095-C Transmissions*.
- Transmit Form 1094-C/1095-C XML data files to the IRS
See *ACA Transmission and Submission Process*.
- Retransmit transmissions or submissions if necessary.
See *Rules to Replace Transmission Records* and *Rules to Replace Submission Records*.
- Correct Form 1095-Cs, if necessary.
See *Correcting Printed Forms 1095-C* and *Correcting Form 1095-C Records*.
- Correct Form 1094-C, if necessary.
See *Correcting a Form 1094-C Record*.
- Transmit corrected Forms 1094-C/1095-Cs to the IRS, if necessary.
See *Correcting Transmitted Forms 1094-C and 1095-C*.

2 Understanding ACA Health Coverage Information Returns (AIR) Reporting

ACA Health Coverage Information Returns (AIR) Features

US Affordable Care Act (ACA) year-end processing includes the following features:

- Flexibility
Flexible setup for establishing Internal Revenue Service (IRS) reporting codes and processing, which considers offer and coverage with or without benefits administration enrollment data.
- Control over reporting
Review and reset workfiles before producing forms. Edit data in, or add or import data to the reporting workfiles before producing the final forms.

The system supports the following ACA year-end forms:

- 1095-C - Employer-Provided Health Insurance Offer and Coverage
- 1094-C - Transmittal of Employer Provided Health Insurance Offer and Coverage Information Returns

These ACA year-end forms serve as important documents for employees, employers, and the Internal Revenue Service (IRS).

Release Levels

The software for processing US ACA year-end information is available for the following release levels:

- EnterpriseOne 9.2

For releases prior to 9.2, please contact Advanced Customer Services to inquire about Market-Driven Support.

Changes to AIR Year-End Processing

All Applicable Large Employer Members (ALE Members) have to file Forms 1094-C and 1095-C. Final forms and form instructions are available on the IRS website at www.irs.gov/forms.

An ALE Member must furnish a Form 1095-C to each of its full-time employees by January 31 of the year following the year to which the Form 1095-C relates.

Who Must File Forms 1094-C and 1095-C

Applicable Large Employers, generally employers with 50 or more full-time employees (including full-time equivalent employees) in the previous year, must file Form 1095-C for each employee who was full-time for any month of the

calendar year. Generally, the employer is required to furnish a copy of the Form 1095-C (or a substitute form) to the employee.

Each employer has their own reporting obligation related to the health coverage that they offered (or did not offer) to each of their full-time employees. Generally, an employer is subject to employer shared responsibility provisions under section 4980H when they have 50 or more full-time employees, including full-time equivalent employees, during the prior calendar year.

An employer that offers health coverage through an employer-sponsored self-insured health plan must complete Form 1095-C, Parts I, II, and III, for any employee who enrolls in the health coverage, irrespective of whether the employee is a full-time employee for any month of the calendar year. If the employee who enrolled in self-insured coverage is a full-time employee for any month of the calendar year, the employer must complete Part II (in addition to Parts I and III). If the employee who enrolled is not a full-time employee, for any month of the calendar year (which means that for all 12 calendar months the employee was not a full-time employee), the employer must complete Form 1095-C, Parts I and III and on Part II, must enter code 1G on line 14 in the "All 12 Months" column or in each separate monthly box (the employer need not complete Part II, lines 15 and 16 in this case). If an employer is offering health coverage to employees other than under a self-insured plan, such as through an insured health plan or a multi-employer health plan, the issuer of the insurance or the sponsor of the plan providing the coverage is required to furnish the information about their health coverage to any enrolled employees, and the employer should not complete Form 1095-C, Part III, for those employees. An employer that offers employer-sponsored self-insured health coverage but is not an applicable large employer subject to the employer shared responsibility provisions under section 4980H, should not file Forms 1094-C and 1095-C.

You should submit Form 1095-C for:

- Employees who were full-time for any month of the year.
- Employees who enrolled in self-insured coverage, regardless of their full-time status.
- COBRA participants and retirees covered under a health coverage plan.

Authoritative Transmittal for Employers Filing Multiple Forms 1094-C

Each original submission to the IRS contains one Form 1094-C and several Form 1095-Cs. An employer may create as many submissions as they need. If an employer creates multiple submissions (files multiple Forms 1094-C and accompanying Form 1095-Cs), one submission must contain an Authoritative Transmittal 1094-C, containing summary information for the employer.

Note: A Form 1094-C designated as a Authoritative Transmittal can be identified on Line 19, Part I of Form 1094-C.

When to File Forms 1094-C and 1095-C With the IRS

You will meet the requirement to file Forms 1094-C and 1095-C if the forms are properly addressed and mailed on or before the due date. If the regular due date falls on a Saturday, a Sunday, or a legal holiday, file by the next business day. A business day is any day that is not a Saturday, a Sunday, or a legal holiday.

Generally, you must file Forms 1094-C and 1095-C with the IRS by February 28 if filing on paper (or March 31 if filing electronically) of the year following the calendar year to which the return relates.

If you have to file 250 or more information returns, you must file electronically. The 250-or-more requirement applies separately to each type of form. For example, if you must file 500 Forms 1095-B and 100 Forms 1095-C, you must file Forms 1095-B electronically, but you are not required to file Forms 1095-C electronically. The electronic filing

requirement does not apply if you apply for and receive a hardship waiver. The IRS encourages you to file electronically even if you are filing fewer than 250 returns.

Note: JD Edwards EnterpriseOne does not support paper filing of ACA Information Returns to the IRS.

How to File Forms 1094-C and 1095-C

This guide describes how to electronically file Forms 1094-C and 1095-C with the IRS, the only method JD Edwards supports. Once the workfiles have been built and reviewed, you will produce paper Form 1095-Cs for sending to recipients. Then, you will prepare the XML files to transmit to the IRS through the ACA Information Returns (AIR) System Web portal.

The Internal Revenue Service (IRS) strongly encourages the quality review of data before filing to prevent erroneous notices from being mailed to statement recipients (or others for whom information is being reported).

Furnishing Form 1095-C to Recipients

You will meet the requirement to furnish Form 1095-C to an employee or other recipient if the form is properly addressed and mailed on or before the due date. If the regular due date falls on a Saturday, a Sunday, or a legal holiday, file by the next business day. A business day is any day that is not a Saturday, a Sunday, or a legal holiday.

An employer must furnish Form 1095-C to each of its full-time employees by January 31st of the year following the year to which the Form 1095-C relates.

Transmitting Forms 1094-C and 1095-C to the IRS

Affordable Care Act Information Returns (Forms 1094-C and 1095-C) must be filed using "AIR" (Affordable Care Act Information Return System). The transmission of returns must be in the defined XML format with a limit of up to 100 MB.

Ensure that the registration, TCC application, and pre-filing activities are complete. To use the AIR system, you must apply for and receive a Transmitter Control Code (TCC), and pass a one-time communication test. The TCC application is available on IRS.gov. Refer to the IRS publications [5164](#), [5165](#), and to the [IRS Affordable Care Act Information Returns \(AIR\) Program](#) for more information.

Preparation for AIR Year-End Reporting

The following information helps you determine how to prepare for year-end reporting.

Government Regulations

JD Edwards EnterpriseOne believes the IRS information that is included for your reference in this guide to be accurate as of the date of its publication, but you should not rely on it as your sole source of information when filing reports or returns with the IRS. You should refer to the appropriate IRS publication or regulation for more information and for guidance about filing requirements.

Note: To adhere to the IRS Information Returns reporting requirements, you must understand the IRS legislation and form instructions, the responsibilities, and the potential liabilities. You should be familiar with and understand ACA legislative requirements, and refer to the legal counsel or other advisors for guidance.

Supported Forms

The JD Edwards EnterpriseOne system supports the Form 1094-C Transmittal and Form 1095-C applicable to ALEs. Forms 1094-B and 1095-B apply to insurance providers and are not supported by the JD Edwards EnterpriseOne system.

Paper Forms

If you are filing your returns on paper, see Pub. 5223 for specifications for private printing of substitute information returns. You may not request special consideration. Only forms that conform to the official form and the specifications in Pub. 5223 are acceptable for filing with the IRS.

Note: JD Edwards EnterpriseOne does not support paper filing of health coverage returns with the IRS and therefore does not support printed Forms 1094-C or 1095-C for filing to the IRS. The system only supports printing Form 1095-C for recipients.

Electronic Filing of ACA Information Returns

JD Edwards EnterpriseOne supports electronic submission of Forms 1094-C and 1095-C. It does not support paper filing of ACA Information Returns to the IRS. The system only supports printing Form 1095-C for employees/recipients.

As per the IRS electronic filing requirement, if you have to file 250 or more Form 1095-Cs, you must submit your returns electronically. The IRS encourages you to file electronically even if you are filing less than 250 forms.

Publication 5165, Guide for Electronically Filing Affordable Care Act (ACA) Information Returns (AIR) for Software Developers and Transmitters (Processing Year 2016), outlines the transmission formats, business rules, and validation procedures for filing AIR returns electronically through the AIR system.

You can use the guidelines provided in Pub. 5165 along with the Extensible Markup Language (XML) Schemas published on IRS.gov.

Registering for E-Services

To avail the IRS online service, you as an issuer/transmitter must submit the application for ACA Information Return Transmitter Control Code. After you receive the confirmation code, you can file ACA Information Returns forms, Form 1094-C and Form 1095-C electronically. You need a Transmitter Control Code (TCC) to directly submit the forms to the IRS.

Each company filing ACA Returns should have a separate TCC number.

Before e-filing, you must register through the Affordable Care Act Information Returns (AIR) program. The registration process will generate the login credentials necessary to submit the ACA Information Returns.

Deadline Information

Generally, you must file Forms 1094-C and 1095-C by February 28 of the year (if filing on paper) or March 31 of the year (if filing electronically), following the calendar year to which the return relates.

Deadline Extensions and Waivers of Reporting Requirements

You can get an automatic 30-day extension of time to file by completing Form 8809 (Application for Extension of Time To File Information Returns).

Note:

According to the IRS notice 2016-4, because of these extensions, the provisions regarding automatic and permissive extensions of time for filing information returns and permissive extensions of time for furnishing statements will not apply to the extended due dates.

Refer to the related IRS published notice (www.irs.gov/pub/irs-drop/n-16-04.pdf) for more details.

To receive a waiver from the required filing of information returns electronically, submit Form 8508. You can request for a waiver from filing information returns electronically at least 45 days before the due date of the returns. You cannot apply for a waiver for more than one tax year at a time. If you need a waiver for more than one tax year, you must reapply at the appropriate time each year.

IRS Resource List

To obtain the forms and for the latest information about developments related to Form 1094-C, Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns, and Form 1095-C, Employer-Provided Health Insurance Offer and Coverage, and instructions, such as legislation enacted after they were published, go to www.irs.gov/form1094c and www.irs.gov/form1095c.

You can also access Form 1094-C and 1095-C instructions on the IRS website at www.irs.gov/pub/irs-pdf/i109495c.pdf. This document includes instructions for both forms and references to several other IRS resources and websites.

The AIR Year-End Processing Cycle and Process Flow

This section discusses:

- AIR Year-End processing checklist
- AIR Year-End process flow

AIR Year-End Processing Cycle

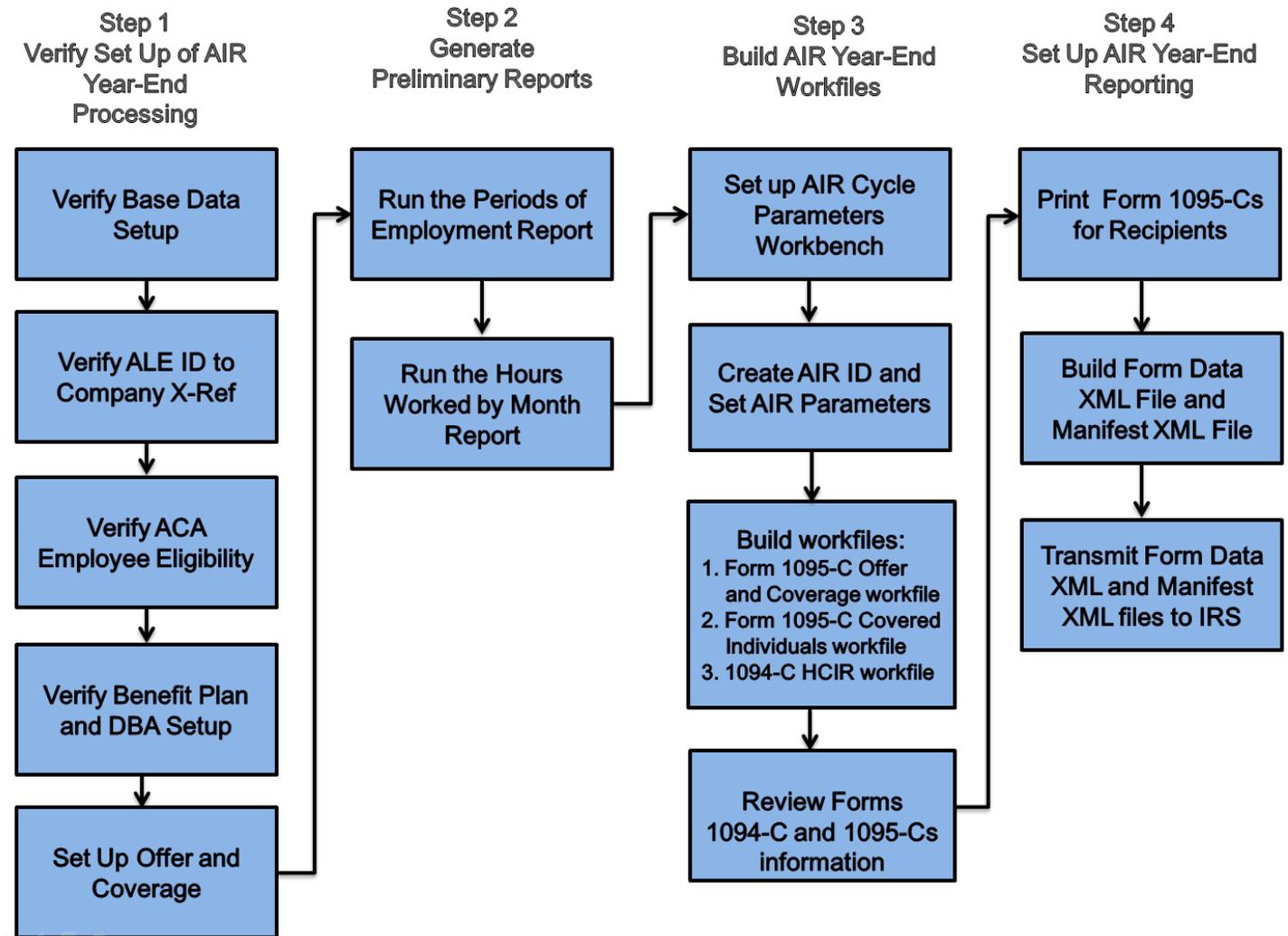
To process AIR year-end information, use the following checklist:

Task	Corresponding Documentation and Information
Install the update.	You must install the update to run year-end programs. This guide does not include software installation instructions and the necessary application-specific instructions (ASIs).
Verify employee setup. Verify the format of employee names and addresses in the Address Book system to ensure that the information you report to the government and to the employees is accurate.	Note: If employee names are not formatted correctly, government reporting agencies might not accept the year-end information that the organization submits. You might have to process a conversion program to ensure that all employee names are formatted correctly
Set up base data. <ul style="list-style-type: none"> • Set up ALE ID to Company Cross-Reference. • Verify ACA employee eligibility data. • Verify benefits enrollment information. • Set up Employee Offer and Coverage information. 	See <i>Setting Up AIR Year-End Processing</i> .
Generate preliminary reports: <ul style="list-style-type: none"> • Periods of Employment Report • Hours of Service by Month Report 	See <i>Generating ACA Health Coverage (AIR) Preliminary Reports</i> .
Build AIR year-end workfiles: <ul style="list-style-type: none"> • 1095-C Offer and Coverage Workfile • 1095-C Covered Individuals File Build for self-insured plans • 1094-C HCIR Workfile 	See <i>Setting Up ACA Information Returns Workfiles</i> .

Task	Corresponding Documentation and Information
Review and validate workfile information online.	See <i>Reviewing ACA Information Returns (AIR) Workfile Information</i> .
<p>Print Form 1095-C for distribution to form recipients.</p> <p>Build Form Data XML file (containing the Forms 1094-C and 1095-C information) and the accompanying Manifest XML file for transmission. The Form Data XML file contains one or more submissions.</p> <p>Upload transmission XML files to the IRS.</p> <p>Replace rejected transmissions.</p> <p>Correct Forms 1094-C and 1095-Cs and resubmit for transmission.</p>	See <i>Producing AIR Year-End Deliverables</i> .

AIR Year-End Process Flow

This diagram illustrates the process workflow of AIR year-end information:



3 Setting Up AIR Year-End Processing

Understanding Base Data Setup for AIR Year-End Processing

Before you print the ACA Health Coverage Information Returns forms, you need to verify that the required information is available in the system and is set up correctly. To support the requirements for producing health coverage information returns, the system uses data from various tables throughout Human Capital Management, including Human Resources, Benefits, and Payroll.

If the data required to complete the returns is not available on your system, you have the option to add or import the data.

Before you begin setting up data for ACA information returns, verify the following:

- Employee setup
Verify the format of employee names and addresses in the Address Book system to ensure that the information you report to the government and to the employees is accurate.
See *"Adding Employee Records One at a Time"* and *"Adding Employee Records Using Employee Quick Hire"* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide* .
- Dependents' information
See *"Creating Dependent and Beneficiary Records"* in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide* .

Note:

If you are not using the required Payroll and Human Resources systems or a certain feature of the system that is required for ACA Information Returns, you might not have all of the data required to produce Information Returns. The system provides the ability to import data into certain ACA tables and the reporting workfiles. You can also add, edit, and delete information in the reporting workfiles.

See *Affordable Care Act Information Returns Work Tables and Considerations for Importing Data* document on My Oracle Support Document ID **2065515.1**.

Setting Up Data for Generating AIR Reports

This section provides an overview of data setup and discusses how to:

- Associate JD Edwards companies to an ALE ID.
- Generate ACA Hours of Service report.
- Verify ACA employee eligibility.

Forms Used to Set Up Data for Generating AIR Reports

Form Name	Form ID	Navigation	Usage
ALE ID To Company Cross Reference	W08116A	On the ACA Information Returns Setup menu (G07BACAS), select ALE to Company Xref.	Associate JD Edwards companies to an ALE ID. See <i>"Setting Up Applicable Large Employers"</i> in the <i>JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide</i> .
Work With Hours of Service Workbench	W081162A	ACA Eligibility (G08ACA), Hours of Service Workbench	Review ACA records. See <i>"Working with Hours of Service Workbench"</i> in the <i>JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide</i> .
Work With ACA Employee Eligibility	W081161A	On the Work With Hours of Service Workbench form, select Employee Eligibility from the Form menu.	Work with employee eligibility for an ACA ID. See <i>"Working with ACA Details for an Employee"</i> in the <i>JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide</i> .

Adding JDE Companies to ALE

An Applicable Large Employer (ALE) will have one or more ALE Members. An ALE with more than one ALE Member, is referred to as an Aggregated ALE Group. An ALE Member will equate to all JD Edwards companies with a single Employer Identification Number (EIN). The ALE ID to Company Cross reference is required only if you are preparing information returns for an Aggregated ALE Group.

Access the ALE ID To Company Cross Reference form to define JD Edwards companies for an Applicable Large Employer (ALE). You need the ALE ID to company association to set up ACA employee eligibility information details for employees and for JDE companies.

The ALE ID to Company Cross Reference groups JD Edwards companies to an ALE to measure the hours of service for employees.

For details about adding JDE companies to ALE, see *"Setting Up Applicable Large Employers"* in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide* .

Generating ACA Hours of Service Report

As a part of producing ACA Health Coverage Information Returns, employees who should receive a Form 1095-C must have an ACA Employee Eligibility record or records that indicate the employee's full-time or non-full-time eligibility status, for each month of the reporting year, under ACA provisions. You can optionally use the Hours of Service report process to create ACA Employee Eligibility records, whether or not you are actually measuring hours of service, according to ACA provisions, to determine eligibility.

Run the ACA Hours of Service Report (R081161) in proof or final mode to generate the hours of service report. You use this report to determine which employees meet the ACA hours of service threshold and should be considered full-time under ACA provisions.

The Hours of Service report is designed to measure an employee's hours of service for a prior period, for determining the eligibility for an offer of health coverage in a future period under ACA provisions. You can use the Hours of Service report as a preliminary step before benefits enrollment periods. The Hours of Service report can also generate ACA Employee Eligibility records, based on the results of the hours of service calculation, that indicate an employee's ACA eligibility status.

ACA Employee Eligibility records are referenced by the ACA Health Coverage Information Returns process to determine an employee's full-time or non-full-time status for each month of the year. This information is required to determine which employees should receive a Form 1095-C and also to determine certain code values for Form 1095-C, Part II, Line 14 and Line 16. You can also manually enter ACA Employee Eligibility information.

For details about generating ACA Hours of Service report, see *"Working with Hours of Service Workbench" in the JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*.

ACA Employee Eligibility and Limited Non- Assessment Period

A Limited Non-Assessment period (LNAP) refers to a period during which an ALE Member is not subject to an assessable payment under section 4980H(a) and in some cases under 4980H9(b), for a full-time employee, regardless of whether that employee is offered health coverage during that period.

The period of non-assessment and the reason for non-assessment are new values that have been included in the ACA Employee Eligibility table. LNAP information is used to determine the appropriate code value for Form 1095-C, Part II, Line 16.

Verifying ACA Employee Eligibility

Access the Work With ACA Employee Eligibility program (P081161) to review employee eligibility information created by the Hours of Service report or to add or update employee eligibility information. The ACA Employee Eligibility includes the Eligibility Status that indicates the employees full-time or non-full-time status. The Eligibility Status determines whether an employee is considered full-time under ACA provisions, and therefore eligible for an offer of health insurance coverage.

Note: Each reportable employee needs an ACA Employee Eligibility record or records that indicate their eligibility status for each month of the reporting year.

Note: The ACA Employee Eligibility record provides the ability to indicate the LNAP for an employee. When the LNAP flag is checked, indicate the End Date of the LNAP and the Reason Code. The Effective Date of the ACA Employee Eligibility Record represents the start of the LNAP.

For details about how to review employee eligibility details, see *"Working with ACA Details for an Employee" in the JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*.

Setting Up Benefit Plans and DBAs

ACA Health Coverage Information Returns is primarily based on benefits and benefits enrollment information. Complete the benefit plans setup for health coverage information returns reporting. If you do not use the Benefits system for benefits enrollment, or you do not enroll all employees through benefits, you can use the deductions or benefits (DBAs) setup to indicate the DBAs to use in determining offer and coverage information reports.

Setting Up Benefit Plans

Complete the benefit plans setup to identify:

- Reportable health coverage plans
- Self-insured plans
- Waived health coverage plans

For more details see:

- "Setting Up Benefit Plans" section in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*
- *Setting Processing Options for the 1095-C Offer and Coverage Workfile Build Report (R08119)*

Reportable Health Coverage Plans

The system needs to determine which benefit plans are reportable health coverage plans and therefore which benefit enrollment records should be considered for reporting.

To identify a plan as reportable for health coverage information returns, use the Plan Master Plan Type and the UDC Special Handling Description fields. You can use any UDC value for Plan Type, but the UDC value must have the value of **M** in the UDC Special Handling Description for the plan to be considered reportable.

Self-Insured Plans

The system needs to determine which plans are self-insured plans and therefore when to check the self-insured plan box on Form 1095-C and to complete Part III - Covered Individuals.

To indicate that a plan is a self-insured plan, choose a Category Code associated to the Plan Master that you define as the indicator for a Self-Insured Plan. Also, choose the value that you are using to indicate self-insured, and update the Category Code with this value.

Waived Health Coverage Plans

The system needs to determine if an employee was offered health insurance coverage but declined it. On your waived or declined plan, to indicate that a plan is a non-participating plan, check the plan's Non-Participating Plan flag. This

flag is a check box on the Plan Master Self Service tab and is not displayed if the Requires Dependents or Requires Beneficiaries options are selected on the General tab. Ensure that the Dependent/Beneficiary flag is not checked on your waive/decline plan. The Non-Participating Plan flag can be set to Yes on Plan Master Options form if you are using plan options instead of only plans.

For more details, see the "Adding a New Benefit plan" section in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*.

Note:

The Non-Participating Plan flag influences how the plan is represented through Benefits self-service enrollment processes. With a certain system setup, a Non-Participating plan can be set up so that if an employee does not select a plan, they are automatically enrolled to a default plan. If you use self-service for benefits enrollment, and you are not sure whether this flag will be compatible with your setup, JD Edwards recommends that you do not set this flag until after Open Enrollment and before ACA year-end reporting.

In addition, if you currently do not use JD Edwards Employee Self Service, you will need to enable self service for the Non-Participating Plan Flag to display. To enable Employee Self Service, access Data Item USEESS in the Work with HRM Common Display Settings program (P05004) and change the setting from No to Yes.

Setting Up DBAs

If you are not using Benefits Plans to identify offers of coverage, complete the DBA setup to identify:

- Reportable health coverage DBAs
- Self-insured DBAs
- Setup for employees who have waived a health coverage DBA

Reportable Health Coverage DBAs

The system needs to determine which DBAs are reportable health coverage DBAs, and therefore which deductions or benefits should be considered for reporting.

To identify a DBA as reportable for health coverage information returns, use a Category Code associated to the Work with PDBAs (P059116) program that you have designated to identify reportable DBAs. Also, choose the value that you are using to indicate self-insured DBAs and update the Category Code with this value.

Note: If you have a deduction and a benefit that represents an offer of health coverage, you can set up either the deduction or the benefit as the reportable health coverage DBA. You do not need to set up both the deduction and the benefit as reportable.

Self-Insured DBAs

The system needs to determine which DBAs are self-insured, and therefore when to check the self-insured plan box on Form 1095-C and when to complete Part III - Covered Individuals.

To indicate that a DBA is for self-insured coverage, choose a Category Code associated to the DBA that is defined as Self-Insured. Also, choose the value that you are using to indicate self-insured DBA, and update the Category Code with this value.

Setup for Employees who have Waived a Health Coverage DBA

When you are not using benefit plans, and you want to indicate that an employee waived health coverage offered through a DBA, you must set up the employee with an eligibility code on the Employee Master form and enter a value that indicates that the health coverage is waived. You can choose any eligibility code from code 1 to 10. Also, to indicate the dates of the waive, select two user-defined dates: one to indicate the start of the waive, and one to indicate the end of the waive. If the waive plan eligibility code is set to a Yes value, and the dates are blank, then the system concludes that the waive covers the entire reporting year.

Setting Up Employee Offer and Coverage Values (Line 14-17 of Form 1095-C)

This section provides an overview of employee offer and coverage setup (information in lines 14, 15, 16 and 17 on Part II of Form 1095-C), and discusses how to:

- Set up lines 14, 15, 16 and 17 for reporting in Form 1095-C, Part II.
- Add or update Employee Offer and Coverage setup.
- Run the Offer and Coverage Employee Override Records report.

Understanding Offer and Coverage Setup

You can use the Work With Employee Offer and Coverage Setup program (P08117) to set up values for lines 14, 15, 16 and 17 of Form 1095-C, Part II. You can also use the import functionality to create information in this table, or you can use the Offer and Coverage Employee Overrides report (R08117) to generate records with similar values for selected employees.

Form 1095-C Part II Employee Offer and Coverage includes four lines:

- Line 14 - Offer of Coverage
- Line 15 - Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage
- Line 16 - Applicable Section 4980H Safe Harbor
- Line 17 - ZIP Code

The offer of coverage code from IRS Code Series 1 that applies to an employee for each month of the year or for all 12 months of the year is reported on Form 1095-C, Part II, Line 14 in the All 12 Months column or in the Jan-Dec columns.

The amount that represents the Employee Share of Lowest Cost Monthly Premium for Self-Only Minimum Value Coverage is reported on Form 1095-C, Part II, Line 15 in the All 12 Months column or in the Jan-Dec columns. This amount may not be the amount that the employee is paying for the coverage. For example, if the employee chose to enroll in more expensive coverage such as family coverage. Complete Line 15 only if code 1B, 1C, 1D, or 1E is entered in Line 14.

Line 16 reports the applicable IRS code from Code Series 2 to report certain situations indicating safe harbor or other relief for employers administration. The IRS instructions state that Line 16 can be blank.

Line 17 reports the applicable ZIP code your employer uses for determining the availability for an individual coverage HRA. If code 1L, 1M, or 1N is used in Line 14, the ZIP code will be for the employee's primary residence location. If code 1O, 1P, or 1Q is used in Line 14, the ZIP code will be for the employee's primary work location. Line 17 will be blank for any other code that is entered in Line 14.

The Offer and Coverage values can be set by:

- Plan/Plan Option
- DBA, with or without Union code
- Employee

When retrieving codes and values from Employee Offer and Coverage Setup, the system associates codes as follows:

- Based on an employee's benefit enrollment, setup values are determined based on Plan/Plan Option setup

Note: If your reportable plans are set up with plan options, you must also set up offer and coverage values by plan/plan option.

- Based on employee DBA Transaction history (F0719), setup values are determined based on the DBA number, with or without Union Code.

The setup associated to an employee number overrides other setup values.

Note:

JD Edwards Health Coverage Information Returns processing is designed to accommodate, to the extent possible, the reporting of health coverage information for customers using Benefits Administration and for customers who do not use Benefits but instead set up and process DBAs for employees through payroll processing.

For enrollment that is done through Benefits Administration, the system refers to Benefits Enrollment (F08334) information to establish an employee's offer of health insurance coverage.

When enrollment is not done through benefits, and outside of any months where benefits enrollment is found, the system will check both DBA Instructions (F06106) and DBA Transaction Detail History (F0719) to establish an employee's offer of coverage. In this case, any F0719 amount in a month indicates an offer of coverage for the month. In addition, the Employee Master category code that indicates the employee was offered coverage but waived coverage is also considered.

Forms Used to Set Up Employee Offer and Coverage

Form Name	Form ID	Navigation	Usage
Work With Employee Offer and Coverage Setup	W08117B	On the ACA Information Returns Setup menu (G07BACAS), select Offer and Coverage Setup.	Review offer and coverage setup records.

Form Name	Form ID	Navigation	Usage
Employee Offer and Coverage Setup Revisions	W08117C	On the Work With Employee Offer and Coverage Setup form, click Add. OR On the Work With Employee Offer and Coverage Setup form, select a record and click Select.	Define Line 14, 15, and 16 codes and values.

Work With Employee Offer and Coverage Setup (P08117)

Access the Employee Offer and Coverage Setup Revisions form.

Plan ID

Enter the Plan ID that identifies the reportable benefit plan. Examples of benefits are Employee Health Insurance, Employee Stock Appreciation Rights, or Health Club Expense Reimbursement. A benefit plan typically is associated with a deduction, a benefit, or an accrual. For example, a medical plan is a benefit that might also require a deduction to withhold premiums from an employee's pay.

When an employee has benefits enrollment records, the system looks for a setup record for the enrollment Plan or Plan and Plan Option.

Plan Option

Enter a code from the Plan Additional Options table (F083202) that identifies any additional options available for a benefit plan. Additional options must have the same provider, policy number, and enrollment and eligibility rules as the benefit plan to which they are associated.

If your benefit plans are set up with Plan Options, your Offer and Coverage Setup must also be setup to include Plan Options.

PDBA Code

Enter a code that defines the benefit or deduction associated with a reportable offer of coverage.

Deductions and benefits are numbered from 1000 to 9999.

When you are not using Benefits Administration to enroll employees, but instead, you are processing health insurance coverage through union setup or DBA setup, you can associate Line 14 - 16 values to DBAs.

Union Code

Enter a value from UDC 06/UN that represents the union or plan in which the employee or group of employees work or participate.

When you are setting up Line 14 - 17 values to DBAs, you can optionally include a Union Code. When the system looks at DBA Transaction History Detail (F0719), the Union Code on the record will also be considered.

Employee Number

Enter the employee number, tax ID, or alternate number, depending on the employee number mode that is set up in the Payroll Constants for company 00000.

Offer and coverage setup at the employee level overrides setup at the Plan or DBA level.

ACA 1095-C Line Num

Enter a code that indicates the line number on Form 1095-C to which the Employee Offer and Coverage setup record pertains.

The value *All indicates that the record may contain values for any or all three lines.

Note: When using the value *ALL to establish a record with values for all three lines, you must be careful to not create a conflicting or overlapping record for the same Plan/Plan Option, DBA/Union, or Employee for the same date range. This could lead to unpredictable results. If you are unsure about the use of *All, you can set up only for specific line numbers.

Effective From

Enter the date on which the offer and coverage setup becomes effective. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.

Note: This date must be the first day of the month.

Effective Thru

Enter the date on which the offer and coverage setup becomes inactive. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.

Note: This date must be the last day of the month.

ACA Offer of Coverage Code

Enter the IRS-defined Code Series 1 code that specifies the type of coverage, if any, offered to an employee, the employee's spouse, and the employee's dependents.

The Offer of Coverage code is reported in Line 14 of Section II the Form 1095-C.

ACA Lowest Cost Monthly Premium

Enter the amount of the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee.

The Lowest Cost Monthly Premium is reported in Line 15 of Section II of the Form 1095-C.

The value in this field is set to zero when the employee is offered coverage but is not required to contribute to the premium.

Note: Enter the Lowest Cost Monthly Premium only when the Offer of Coverage Code for the month is 1B, 1C, 1D or 1E.

ACA Safe Harbor Code

Enter the IRS-defined Code Series 2 code to report that one of the following situations applied to the employee:

- The employee was not employed.
- The employee was not a full-time employee.
- The employee enrolled for the minimum essential coverage offered.
- The employee was in a Limited Non-Assessment Period.

- Non-calendar year transition relief applied to the employee.
- The employee met one of the 4980H affordability safe harbors.
- The employer was eligible for multiemployer interim rule relief.

The Safe Harbor Code is reported in Line 16 of Part II of the Form 1095-C.

Running the Offer and Coverage Employee Override Records Report

The Offer and Coverage Employee Override Records report is an optional report that you can use to populate the Employee Offer and Coverage Setup table with override records for employees. This report is based on the Employee Master table (F060116); therefore, you can select employees based on common values to group employees who need to report the same value for line 14, 15, or 16. For example, you might have used a particular IRS Safe Harbor method for determining health coverage affordability for certain employees, such as the federal poverty line safe harbor (code 2G). You can use this report to select those employees and create a record for Line 16 to report 2G.

Setting Processing Options for R08117

Processing options enable you to specify the default processing for programs and reports.

Process

Processing Mode

Use this processing option to specify whether the system processes records in proof or final mode. When you choose proof mode, the system creates a report, but does not update any tables. When you choose final mode, the system creates a report and writes employee override records to the Employee Offer and Coverage Setup (F08117) table.

1095-C Line Number

Use this processing option to specify the code that indicates the line number to use when generating employee override records in the Employee Offer and Coverage Setup (F08117) table.

Note: When you leave this option blank or when you enter a value of *ALL, the system sets the ACA 1095-C Line Number to *ALL and the processing option values for Override Offer of Coverage Code, Override Lowest Cost Monthly Premium, and Override Safe Harbor Code will all be used when generating employee override records in the Employee Offer and Coverage Setup (F08117) table. When you enter a specific line number, such as Line 14, the system uses only the corresponding processing option (for example, Override Offer of Coverage Code) to populate its corresponding column when generating employee override records in the Employee Offer and Coverage Setup (F08117) table.

Effective From Date (Required)

Use this processing option to specify the beginning date on the Employee Offer and Coverage Setup record (F08117).

Note: This date must be the first day of the month.

Effective Thru Date (Required)

Use this processing option to specify the ending date on the Employee Offer and Coverage Setup record (F08117).

Note: This date must be the last day of the month.

Offer of Coverage Code

Use this processing option to specify the IRS-defined Code Series 1 code that specifies the type of coverage, if any, offered to an employee, the employee's spouse, and the employee's dependents.

Lowest Cost Monthly Premium Amount

Use this processing option to specify the amount of the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee.

Safe Harbor Code

Use this processing option to specify the IRS-defined Code Series 2 code to report that one of the following situations applied to the employee:

- The employee was not employed.
- The employee was not a full-time employee.
- The employee enrolled for the minimum essential coverage offered.
- The employee was in a Limited Non-Assessment Period.
- Non-calendar year transition relief applied to the employee.
- The employee met one of the 4980H affordability safe harbors.
- The employer was eligible for multiemployer interim rule relief.

ACA Application Process for TCC

Before e-filing, you must procure your company's Transmitter Control Code (TCC) and register through the Affordable Care Act Information Returns (AIR) program. The registration process will generate the login credentials necessary to submit the ACA Information Returns electronically.

Each company filing ACA Returns should have a separate TCC number.

The Transmitter Control Code (TCC) application is available on IRS.gov. Ensure that the registration, TCC application, and pre-filing activities are complete. You will also need to complete a one-time AIR System communications test by submitting a test file to the IRS AIR System.

Refer to the IRS publications [5164](#), [5165](#), and to the [IRS Affordable Care Act Information Returns \(AIR\) Program](#) for more information.

4 Generating ACA Health Coverage (AIR) Preliminary Reports

Understanding Health Coverage Preliminary Reports

Preliminary reports are the data facilitation reports that provide some essential information required for generating the Form 1095-C workfiles.

The preliminary reports are:

- Periods of Employment report
- Hours Worked by Month report

Periods of Employment

As a Benefits Administrator, you use the Periods of Employment report to review which months an employee was employed or not employed during the reporting year.

The Periods of Employment report helps to identify gaps in offers of health coverage for a month, if the gap is due to the employee not being employed during the month. This information is required to correctly report Form 1095-C Part II Employee Offer and Coverage codes.

The Periods of Employment (R08118) batch version processes the employee's employment period information from the HR History table (F08042) and updates it in the Periods Of Employment table (F08118). The Periods of Employment report (R08118) finds occurrences of Date Started and Date Terminated for an employee and sequences them according to effective date to construct a history of an employee's employment periods.

Note:

The Periods of Employment report (R08118) processes employees based on HR History and occurrences of Date Started and Date Terminated. If the employee does not have any tracked records for Start Date and/or Termination Date in the HR History table (F08042), then the employee's Start Date and/or Termination Date is retrieved from the Employee Master table (F060116) to update the F08118 table.

When the Form 1095-C Offer and Coverage Workfile Build (R08119) runs, it refers to the Periods Of Employment table (F08118). If no records are found for an employee in the F08118 table, the Form 1095-C Offer and Coverage Workfile Build retrieves the current Start Date and Termination Date value from the Employee Master table (F060116).

You can use the Work With Periods of Employment program (P08118) to review the periods of employment information. This program retrieves the information from the Periods Of Employment table (F08118). You can use the Work With Periods of Employment program (P08118) to review, add, delete, and update data. Any updates to the F08118 table including imported records will be overridden when the R08118 report is processed again.

If you are not using the HR History table, you can use the standard functionality for importing grid data to import existing periods of employment data from a spreadsheet or a comma-delimited file into the Work With Periods of Employment program.

R08118 10/30/15 0:33:05

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 Periods of Employment Activity Report Page - 5

Employee Number	Employee Name	Effective			Date			Employment Duration			
		Date Started	Date	Change Reason	Terminated	Date	Change Reason	Days	Weeks	Months	Year
36102	Beerey, Agnes	12/01/08	12/01/08	011 Rehire				2,524	360.6	84.13	6.92
36103	Silvers, Ramon	04/04/04	04/04/04	001 New Hire	12/31/07	12/31/07	TE Termination-Eligible to rehire	1,366	195.1	45.53	3.74
36103	Silvers, Ramon	02/01/08	02/01/08	011 Rehire	02/29/08	02/29/08	TE Termination-Eligible to rehire	28	4.0	93	.08
36103	Silvers, Ramon	04/01/08	04/01/08	011 Rehire	04/30/08	04/30/08	TE Termination-Eligible to rehire	29	4.1	97	.08
36103	Silvers, Ramon	06/01/08	06/01/08	011 Rehire	06/30/08	06/30/08	TE Termination-Eligible to rehire	29	4.1	97	.08
36103	Silvers, Ramon	08/01/08	08/01/08	011 Rehire	08/31/08	08/31/08	TE Termination-Eligible to rehire	30	4.3	1.00	.08
36103	Silvers, Ramon	10/01/08	10/01/08	011 Rehire	10/31/08	10/31/08	TE Termination-Eligible to rehire	30	4.3	1.00	.08
36103	Silvers, Ramon	12/01/08	12/01/08	011 Rehire				2,524	360.6	84.13	6.92
36104	Nordstat, Sven	05/05/05	05/05/05	001 New Hire	04/11/08	04/11/08	TE Termination-Eligible to rehire	1,072	153.1	35.73	2.94
36105	Piper, Margaret	06/06/06	06/06/06	001 New Hire				3,433	490.4	114.43	9.41
36106	Brown, Tanya	06/06/06	06/06/06	001 New Hire				3,433	490.4	114.43	9.41
36107	Goncalves, Jose	07/07/07	07/07/07	001 New Hire				3,037	433.9	101.23	8.32
36108	Nguyen, Thien	08/08/08	08/08/08	001 New Hire				2,639	377.0	87.97	7.23
36109	Chan, Robert	09/09/09	09/09/09	001 New Hire				2,242	320.3	74.73	6.14
36110	Harmon, Gregory	01/01/01	01/01/01	001 New Hire				5,415	773.6	180.50	14.84
36111	Tremblay, Jacques	01/01/01	01/01/01	001 New Hire				5,415	773.6	180.50	14.84

Hours Worked by Month

As a Benefits Administrator, you use the Hours Worked by Month report to review hours worked by an employee by month and by Home Company.

The Hours Worked by Month Report (R08124) calculates the number of hours that the employee worked in a month using the time card history information that is stored in the Employee Transaction History table (F0618). When you run the report, the system updates the Hours Worked By Month table (F08124).

To review the hours worked by month information, you use the Work with Hours Worked by Month program (P08124). This program retrieves the information from the Hours Worked By Month table (F08124). The F08124 table stores the hours worked by calendar month and by company.

Note:

Each employee who should be issued a Form 1095-C must have at least one record in this table to indicate the Home Company employer (equivalent to the ALE Member) under which the employee should be reported. If you do not use JD Edwards Payroll or Time and Labor system and therefore do not have Employee Transaction History (F0618), at least one record must be added or imported for each employee.

This information helps to determine the ALE Member (employer) under which an employee should be reported for each month of the reporting year.

The Hours Worked By Month table (F08124) helps to determine the employer for whom the employee was employed for each month of the year. The Form 1095-C Offer and Coverage Workfile Build refers to the F08124 table to determine the employer. The Offer and Coverage Workfile Build considers hours by company based on Tax ID. That is, if an employee has hours in more than one company in a month, the hours are first combined based on Tax ID, and then hours by Tax ID totals are compared. The Tax ID with the most hours in the month is the ALE Member responsible for reporting the employee for the month. If an employee who is employed in a month does not have any data in the F08124 for a month, for example, because of a leave of absence, the prior month's F08124 data will be used to determine the ALE Member for that month.

Note: According to the IRS Forms 1094-C and 1095-C Instructions, if hours are equal for a month, choose one. The system will choose the lowest numbered company in this case.

You can use the Work With Hours Worked by Month program (P08124) to review, add, delete, and update data. Any updates to the F08124 table including imported records will be overridden when the R08124 report is processed again.

If you do not have Employee Transaction History (F0618) data from which to build the F08124 table, you can use the standard functionality for importing grid data to import an employee's hours worked history from a spreadsheet or a comma-delimited file using the Work with Hours worked by Month (P08124) program.

R08124		Oracle - J.D. Edwards									
		Calculate Employee Worked									
		Hours Per Month by Company									
Reporting Year 2004											
Employee	Employee Name	Employer Tax ID	Company	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
36100	McMillan, John	840782700	00001	184.00	160.00	184.00	176.00	168.00	176.00	176.00	176.00
Totals for Tax ID:		840782700		184.00	160.00	184.00	176.00	168.00	176.00	176.00	176.00
Totals for Employee:		36100	McMillan, John	184.00	160.00	184.00	176.00	168.00	176.00	176.00	176.00
36101	Rutledge, George	840782700	00001	184.00	160.00	184.00	176.00	168.00	176.00	176.00	176.00
Totals for Tax ID:		840782700		184.00	160.00	184.00	176.00	168.00	176.00	176.00	176.00
Totals for Employee:		36101	Rutledge, George	184.00	160.00	184.00	176.00	168.00	176.00	176.00	176.00

Setting Up Periods of Employment Report (R08118)

This section provides an overview of the Periods of Employment report and discusses how to:

- Run the Periods of Employment Report (R08118).
- Set processing options for the Periods of Employment Report (R08118).

- Add or update periods of employment details (P08118).

Running the Periods of Employment Report (R08118)

To run this report from the batch versions program, enter **bv** in the fast path and then specify R08118 on the Work With Batch Versions - Available Versions form. Select the version and submit.

Form Used to Set Up Records in Periods of Employment Report

Form Name	Form ID	Navigation	Usage
Work With Periods of Employment	W08118A	On the ACA Information Returns Inquiries menu (G07BACA), select Periods of Employment.	Review, add, and manage data created by the report or add data to the report.

Setting Processing Options for Periods of Employment (R08118)

Processing options enable you to specify the default processing for programs and reports.

Processing

From Year (CCYY)

Use this processing option to specify the first year of HR History to include when loading the Periods of Employment. The specified year should be far enough in the past for the system to pick up all the current employees.

Thru Year (CCYY)

Use this processing option to specify the ending year of HR History to include when loading the Periods of Employment. This value will normally be the current tax year.

Note: The From Year and Thru Year should be a range of dates that includes all employees who need to be considered for Form 1095-C reporting. For example, if the earliest Date Started for an employee who is still employed is in 2009, you should run Periods of Employment with a From Year = 2009.

Adding or Updating the Periods of Employment Details

Access the Work With Periods of Employment form.

Employed in Year

Enter the year for which you want to filter employees who were active at any time during the year.

Address Number

Enter the employee's Address Book number.

Date Started

Enter the date on which the employee actually reported to work. The Periods of Employment program allows multiple entries if the employee has multiple start dates.

Start Date Effective

A future date when all changes will take effect or the date when the changes went into effect. If you do not enter a date in this field, the system uses the current date as the effective date.

Start Date Change Reason

Enter a code that indicates the reason for change in start date, such as new hire or rehire.

This is a user-defined code (06/T). If you are reactivating an employee, the code must be numeric. The code for new hires is the default reason code.

Date Terminated

The date that the employee was terminated, if applicable.

Termination Date Effective

A future date when all changes will take effect or the date when the changes went into effect.

Termination Date Change Reason

A user-defined code (06/T) that indicates the reason an employee's record changed. For example, you can enter a reason such as eligible for rehire.

Days Employed

Displays the number of days employed.

This is informational only and not relevant to Form 1095-C processing.

Weeks Employed

Displays the number of weeks employed.

This is for information only and not relevant to Form 1095-C processing.

Months Employed

Displays the number of months employed.

This is for information only and not relevant to Form 1095-C processing.

Years Employed

Displays the number of years employed.

This is for information only and not relevant to Form 1095-C processing.

Setting Up Hours Worked by Month Report (R08124)

This section provides an overview of the Hours Worked by Month report and discusses how to:

- Run the Hours Worked by Month report (R08124).
- Set processing options for the Hours Worked by Month report (R08124).
- Add or update hours worked by month records (P08124).

Running the Hours Worked by Month Report (R08124)

To run this report from the batch versions program, enter **bv** in the fast path and then specify R08124 on the Work With Batch Versions - Available Versions form. Select the version and submit.

Form Used to Set Up Records in Hours Worked by Month Report

Form Name	Form ID	Navigation	Usage
Work With Periods of Employment	W08124A	On the ACA Information Returns Inquiries menu (G07BACAI), select Hours Worked by Month.	Review, add, edit and delete records.

Setting Processing Options for Hours Worked by Month (R08124)

Processing options enable you to specify the default processing for programs and reports.

Process

1. Year (Required)

Enter the calendar year for which the Affordable Care Act (ACA) Health Coverage Information Return is being produced. Use this year value to select time cards based on the date entered in the Based on Date processing option.

2. Pay Type Table

Enter the name of the table you defined in Work with Pay Type Table (P08393).

Note: For more information, see "Setting Up Pay Type Tables" in the *JD Edwards EnterpriseOne Applications Benefits Implementation Guide*.

You use this table to specify the pay types to include from the Employee Transaction History table (F0618), in the report.

3. Based on Date

Enter a code to define the date field the system uses in data selection to accumulate the hours worked by month. Valid values are:

- o Blank: Date Worked (Default)
- o Pay Period End Date
- o Check Date

4. Delete and Re-create Records

Enter a code to specify whether R08124 should delete and create values for the reporting year. Valid values are:

- o Blank/0: Do not delete. Overwrite applicable records (Default). This option only updates the records that have a time history.
- o 1: Delete and create records. This option deletes all records in the F08124 table for that reporting year, including the manually created or imported records.

Adding or Updating Hours Worked by Month Records

Access the Work with Hours Worked by Month form.

Year

The calendar year for which the ACA Health Coverage Information Return is being produced.

Employer Tax ID

A number that identifies your company to the tax authority. This number can include the tax ID number for an individual, a federal or state corporate tax ID, a sales tax number, and so on. This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than 9 positions for the tax identification number. Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.

Address Number

A number that identifies an employee address book number in the Address Book system.

Home Company

The company number where the employee records generally reside.

Months - Jan to Dec

The total hours an employee worked in the specified month. This value accumulates Employee Transaction History hours worked based on the date specified in the report processing option.

5 Setting Up ACA Information Returns Workfiles

Understanding the ACA Information Returns Workbench

ACA Information Returns Workbench is a central location where you can set up parameters and versions and run various processes for Affordable Care Act Health Coverage Information Returns (AIR) reporting. The workbench simplifies the process of working with AIR reporting and its associated information.

You access the Work With ACA Information Returns Workbench program (P08210) to perform these procedures:

- Create the 1095-C Offer and Coverage Workfile build.
- Create the 1095-C Covered Individuals File Build (if you have self-insured plans).
- Print Form 1095-C for recipients.
- Reset Form 1095-C workfiles.
- Review and edit 1095-C workfile data records using the Work with Form 1095-C Information program (P08119).

See *Working with Form 1095-C Workfiles Information*.

- Create the 1094-C workfile.
- Reset 1094-C workfile.
- Track the status of processes related to producing Health Coverage Information Returns. Also, manage processes and their statuses including running preliminary reports, submitting workfile build processes, printing forms, and resetting any statuses for reprocessing.

Understanding the AIR Year-End Workfiles

After you have completed the base setup and after generating all the preliminary reports, you can begin the process of creating the AIR year-end workfiles. You generate and use the 1095-C Offer and Coverage Workfile and the 1095-C Covered Individuals File Build to collate all the data for producing Form 1095-C. Once you have created the workfiles, you can review and edit the data before printing forms or doing electronic filing.

The 1095-C Offer and Coverage workfile creates the data for populating Form 1095-C Part II, Employee Offer and Coverage. This workfile includes the values for Line 14, 15, and 16.

The 1095-C Offer and Coverage workfile contains two types of records:

- Detail records by Home Company, Plan/Plan Option, or DBA
- Summary records by Tax ID

The Build 1094-C HCIR workfile creates the data for populating Form 1094-C. This workfile produces employee counts by ALE Member for each month of the year to report the information in:

- Part III, column (b) Full-Time Employee Count for ALE Member
- Part III, column (c) Total Employee Count for ALE Member on the Authoritative Transmittal 1094-C
- Part IV, listing ALE Members of the Aggregated ALE Group.

Note:

According to the IRS instructions for Forms 1094-C and 1095-C, for each full-time employee of an employer, there must be only one Form 1095-C filed for employment with that employer.

For example, if an employer separately reports for each of its two divisions, the employer must combine the offer and coverage information for any employee who worked at both divisions during the calendar year so that a single Form 1095-C is filed for the calendar year for that employee who reports information for all 12 months of the calendar year from that employer.

If you have multiple JD Edwards companies that have the same Tax ID, and therefore are the same employer, employees who work for one or more of those companies will be reported under a single Form 1095-C for the ALE Member.

Before you create the 1095-C workfiles, you must:

1. Create an AIR ID.
2. Set AIR parameters.
3. Create batch versions for the reports you are processing.
4. Set processing options for the 1095-C Offer and Coverage Workfile Build (R08119).
See *Setting Processing Options for the 1095-C Offer and Coverage Workfile Build Report (R08119)*.
5. Set processing options for the 1095-C Covered Individuals File Build (R08120).

Note: You can also import data into the 1095-C Offer and Coverage workfile before printing Form 1095-C.

Understanding the 1095-C Workfiles Definitions

Before you generate Form 1095-C, you must define:

- The AIR ID that defines the records processed by the versions associated to the AIR ID
- The information that you are processing, such as the Reporting Year and whether you are processing Original or Corrected returns
- The versions for the batch processes that you will submit

You define an AIR ID and AIR processing parameters to compile the information required to produce Forms 1094-C and 1095-C and to file electronically.

The first step to create an AIR year-end workfile is to create an AIR ID. The AIR ID identifies the records that are associated with a particular year-end workfile build process. The AIR ID should be unique for each processing year. For example, to process separate year-end workfiles for companies 100, 200, and 300 during a reporting year, then create AIR IDs 100, 200, and 300. Do not use the same AIR ID to process information for different workfile builds.

After you create the AIR ID, you set the ACA Information Returns parameters.

Create an AIR ID

Before you define the criteria for the year-end workfiles, you must create an AIR ID and assign program versions to the AIR ID. You can create a program version either before or at the same time that you create an AIR ID. The AIR ID identifies the information associated to a particular workfile build process for producing forms and filing with the IRS. You use this AIR ID when you run all subsequent steps in the AIR year-end processing cycle.

AIR IDs are alphanumeric and can be up to 10 characters in length. You can set up a single AIR ID to process individual ALE Members or to process all ALE Members together. The AIR ID provides you with a means for creating groups of employees that you will process together.

When you submit the 1095-C workfile build process for an AIR ID, records are created in the workfiles (1095C Offer and Coverage table - F08119 and 1095C Covered Individuals table - F08120) according to the AIR ID and the year being processed. Each time you run the workfile build, all records with the AIR ID and year matching those of the current workfile build are deleted from the AIR year-end tables. The tables are then repopulated with updated information from the workfile build.

To run an AIR ID process again, you must first reset the AIR ID process from the Work With ACA Information Returns Workbench (P08210) and AIR Status form.

To avoid deleting important year-end information, do not use the same AIR ID to process different groups of people at different times within the same calendar year. For example, within a single calendar year, do not use the year-end ID 2000 to process employees from company 001 and then use it to process employees from company 002. This action causes the loss of all year-end information for employees in company 001.

The Offer and Coverage and Covered Individuals tables include a Protected Record field. This field enables to indicate that a record is protected and should not be affected by any subsequent reset or build processes. When resetting an AIR ID, you can choose to also remove protected records. On the Reset Offer and Coverage and Covered Individuals version, set the processing option Delete Protected Records to blank to preserve records with a Protected Record flag equal to Yes.

Set AIR Parameters

Once you have created an AIR ID and set up processing parameters, you need to set certain AIR statuses manually. You set these statuses to a completed status to indicate that you have completed the process or report before running Form 1095-C workfile builds. These processes include:

- ACA Eligibility Hours of Service process
- Periods of Employment Build
- Hours Worked by Month Build

Setting Up AIR Year-End Workfile Parameters

This section discusses how to:

- Create an AIR ID.
- Review AIR statuses.

Forms Used to Set Up AIR Workfiles Parameters

Form Name	Form ID	Navigation	Usage
Work With ACA Information Returns Workbench	W08210A	On the ACA Information Returns Processing menu (G07BACAP), select ACA Information Returns Workbench.	Access forms to enter a new AIR ID, select an existing AIR ID.
ACA Information Returns Processing Parameters	W08210B	On the Work With ACA Information Returns Workbench, click Add.	Create an AIR ID and define workfile data criteria, or revise an existing AIR ID.
AIR Status	W08210C	On the Work With ACA Information Returns Workbench, select an AIR record and then select AIR Status from the Row menu.	View the status of steps in the ACA Information Returns process, or update status values for processes that are completed before the workfile build.

Creating an AIR ID

Access the Work With ACA Information Returns Processing Parameters form.

AIR ID

Enter an alphanumeric value similar to a Payroll ID or a W2 ID, which identifies a customer-defined set of AIR records within one reporting year.

AIR ID Description

Enter a user-defined name for the AIR ID.

ACA Reporting year

Enter the calendar year for which Form 1095-C is being produced.

ACA Transmission Type

Enter a value identifying the type of ACA transmission to the IRS.

Valid values are:

- O - A transmission containing original Form 1095-C records.
- C - A transmission containing correction Form 1095-C records.

AIR ID To Be Corrected

When you are creating an AIR ID for correction forms, enter the AIR ID of the original AIR ID that is being corrected.

Note: If the 1095-C being corrected has been distributed to the employee/recipient, but not yet accepted by the IRS, you will need to reprint the paper Form 1095-C and write "CORRECTED" on the form.

Build 1095-C Offer of Coverage

Enter the batch version used to process the 1095-C Offer And Coverage Workfile Build (R08119) report. This version identifies a specific set of data selection and sequencing settings used to process the 1095-C Offer And Coverage Workfile Build (R08119) report.

Build 1095-C Covered Individuals

Enter the batch version used to process the 1095-C Covered Individuals File Build (R08120) report. This version identifies a specific set of data selection and sequencing settings used to process the 1095-C Covered Individuals File Build (R08120) report.

Reset 1095-C

Enter the batch version used to process the Reset Offer and Coverage and Covered Individuals (R08119X) report. This version identifies a specific set of data selection and sequencing settings for the batch version used to process the Reset Offer and Coverage and Covered Individuals (R08119X) report.

Print Form 1095-C

Enter the batch version used to process Print Form 1095-C (R08119B). This version identifies a specific set of data selection and sequencing settings for the batch version used to process Print Form 1095-C (R08119B).

Build 1094-C

Enter the batch version used to process Build 1094-C HCIR Workfile (R08121A). This version identifies a specific set of data selection and sequencing settings for the batch version used to process Build 1094-C HCIR Workfile (R08121A).

Form 1095-C Print Date

The system displays the date when Form 1095-C information was printed.

Form 1094-C Build Date

The system displays the date when Form 1094-C information was created.

Reviewing ACA ID Statuses

Select the AIR ID and access the AIR Status from Row menu to review AIR statuses in the AIR Status form.

You can review status information about each step in the workfile build at any time during the workfile build process. This information helps to determine whether you can proceed to the next step in the process. Status information can also help you determine whether any errors occurred during the processing that require you to rerun a step. Certain steps in the Status Update are updated by you manually to indicate that the step has been completed. Other steps should only be updated by submit or reset processing.

ACA Eligibility Hours of Service Process

Enter a code that indicates the current status of the ACA Eligibility Hours of Service process for this ACA Information Returns (AIR) cycle.

This status indicates that you have completed setup in the ACA Employee Eligibility table. This information helps to determine an employee's full-time or not-full-time status for each month of the reporting year. ACA Employee Eligibility records can be entered through Work with ACA Employee Eligibility form or created by the Hours of Service report.

Valid values are:

- Blank: Not executed for AIR ID
- **1**: Completed

Periods of Employment Build

Enter a code that indicates the current status of the Periods of Employment build process for this ACA Information Returns (AIR) cycle.

Valid values are:

- Blank: Not executed for AIR ID
- **1**: Completed

Hours Worked by Month Build

Enter a code that indicates the current status of the Hours Worked by Month process for this ACA Information Returns (AIR) cycle.

Valid values are:

- Blank: Not executed for AIR ID
- **1**: Completed

Build Form 1095-C

The status in this field is automatically updated to A when a version of Form 1095-C is submitted for build and is updated to 1 when the process completes. This status is also updated when a reset is performed.

Valid values are:

- Blank: Not executed for AIR ID
- **A**: Active, or in the job queue
- **1**: Completed

Print Form 1095-C

The status in this field is automatically updated to A when a version of Form 1095-C is submitted for printing and is updated to 1 when the print completes. This status is also updated when a reset is performed.

Valid values are:

- Blank - Not executed for AIR ID
- **A** - Active, or in the job queue
- **1** - Completed

Build Form 1094-C

The status in this field is automatically updated to A when a version of Form 1094-C is submitted for build and is updated to 1 when the process completes.

You cannot reset the Form 1094-C build.

Creating the Form 1095-C Workfiles

This section provides an overview of the AIR year-end workfile creation, lists a prerequisite and discusses how to:

- Create the AIR Year-End Workfiles.
- Set processing options for the 1095-C Offer and Coverage Workfile Build report (R08119).
- Set processing options for the 1095-C Covered Individuals File Build report (R08120).

Understanding the Form 1095-C Workfiles Creation

After setting the processing options for R08119 and after setting the AIR parameters, you create the AIR year-end workfiles.

When you submit the 1095-C Offer and Coverage Workfile Build for processing, it generates these three reports:

- 1095-C Offer and Coverage Workfile Build report - R08119
- 1095-C Covered Individuals File Build - R08120 (Optional)
- Offer and Coverage Workfile report - R08119A

The 1095-C Offer and Coverage Workfile Build report (R08119) creates records in the F08119 table. The 1095-C Offer and Coverage Workfile Build report generates the status of the R08119 build and displays a list of employees enrolled for a plan but excluded from the ACA Health Coverage.

The R08119 report also provides details of the employee's eligibility status, effective date (beginning date of the employee's offer of coverage), Pay Status, Start Date, Termination Date, Benefit Group, and Union Code.

The 1095-C Covered Individuals File Build report (R08120) creates records in the F08120 table. This table supports Part III (Covered Individuals) of Form 1095-C and is only required if the employer offers self-insured health coverage. The 1095-C Covered Individuals File Build report details the dependents of the employee, the tax ID, the relationship of the dependent to the employee, the medical plan under which the dependent is covered, and months in the year for which the dependent is covered.

The Offer and Coverage Workfile report (R08119A) reports information from the F08119 and F08120 tables that were created for Form 1095-C Part II and Part III. The report includes the Summary and Detail records that were created in the reporting workfiles:

- The Summary record in the report displays the coverage details of the employee for the specified year. Summary records are used for producing Form 1095-C.
- The Detail record in the report displays more detailed information that influenced how the Summary record was created. The detail records are kept as an audit trail and research aid.

It also lists the employee and their dependents under the Covered Individuals section, if generated.

After you process the workfile build, review the records using the Work with 1095-C Information program (P08119) and make any changes necessary before you begin printing Form 1095-C.

Prerequisites

Before completing the tasks in this section, create an AIR ID and complete the steps for setting AIR returns parameters.

See [Creating an AIR ID](#) and [Reviewing ACA ID Statuses](#).

Forms Used to Create the Form 1095-C Workfiles

Form Name	Form ID	Navigation	Usage
Work With ACA Information Returns Workbench	W08210A	On the ACA Information Returns Processing menu (G07BACAP), select ACA Information Returns Workbench.	Locate and select the AIR ID that you want to process.

Creating the Form 1095-C Workfiles

Access the Work With ACA Information Returns Workbench. Select the AIR ID to process and select Build from the Row menu (*1094-C And 1095-C -> Build 1095-C -> Submit*).

Note:

The recommended practice for processing when reporting for self-insured plans (reporting covered individuals in Part III of Form 1095-C) is to submit R08120 as a part of the submission of R08119 from the ACA Information Returns Workbench.

If R08120 is submitted from the menu or from BV, it will only process if R08119 has already been submitted to first build the corresponding F08119 records. As F08120 records link to F08119 records, the F08119 records must be created first.

Setting Processing Options for the 1095-C Offer and Coverage Workfile Build Report (R08119)

You set the processing options for the batch version of the R08119 report that you want to run before processing the Offer and Coverage Workfile build.

Processing options enable you to specify the default processing for programs and reports.

Benefits Setup

Enter the source for the enrollment begin date for processing Employee Enrollment (F08330) records

Use this processing option to specify the code to indicate which date field on the Employee Enrollment (F08330) record represents the effective beginning date of the employee's offer of coverage.

Valid values are:

- Blank/**EF**: Effective Starting Date
- **DB**: DBA Begin Date
- **ED**: Eligibility Date
- **PD**: Participation Date
- **UD**: User Defined Date

If the source of enrollment begin date is blank on employee enrollment, use alternate date as begin date

Use this processing option to specify the alternate code to indicate which date field to use when the source of enrollment begin date is blank on the Employee Enrollment (F08330) record.

Valid values are:

- Blank/**EF**: Effective Starting Date
- **DB**: DBA Begin Date
- **ED**: Eligibility Date
- **PD**: Participation Date

- o **UD:** User Defined Date

Enter the source for the enrollment end date for processing Employee Enrollment (F08330) records

Use this processing option to specify the code to indicate which date field on the Employee Enrollment (F08330) record represents the end date of the employee's offer of coverage.

Valid values are:

- o Blank/**ET:** Effective Ending Date
- o **DE:** DBA End Date
- o **UD:** User Defined Date

If the source of enrollment end date is blank on employee enrollment, use alternate date as end date

Use this processing option to specify the alternate code to indicate which date field to use when the source of enrollment end date is blank on the Employee Enrollment (F08330) record.

Valid values are:

- o Blank/**ET:** Effective Ending Date
- o **DE:** DBA End Date
- o **UD:** User Defined Date

Extended Enrollment from Ending Date (EFTE): When using Ending Date (EFTE) as the end of coverage date, indicate if coverage extends beyond that date

Use this processing option to specify the value that indicates how the enrollment end date will be set in order to determine the employee's offer of coverage. This processing option only applies when you use the F08330 Ending Date (EFTE) as the end of coverage date.

Valid values are:

- o Blank: Do not adjust the enrollment end date.
- o **A:** For the month when enrollment ends and if the employee was terminated before or in that month, assume coverage for the entire month and (nn) months after the enrollment end date.
- o **B:** For the month when enrollment ends and if the employee was active in the month, assume coverage for the entire month and (nn) months after the enrollment end date
- o **C:** Both A and B apply.

Enter the Benefits Plan Master (F08320) Category Code (PH01-PH10) data item that identifies a plan as a self-insured plan (Required)

Use this processing option to specify the data item column name (PH01 - PH10) in the Benefits Plan Master (F08320) record that identifies self-insured plans.

Enter the value of the Plan Master (F08320) Category Code that indicates a plan is a self-insured plan (Required)

Use this processing option to specify the value of the data item column name (PH01 - PH10) in the Benefits Plan Master (F08320) record that identifies self-insured plans.

DBA Setup

Enter the Payroll Transactions (F069116) Report Code (PR01- PR10) data item that identifies a DBA as reportable for health coverage reporting (Required)

Use this processing option to specify the data item column name (PR01 - PR10) in the Payroll Transactions (F069116) record that identifies medical DBAs.

Enter the value of the Payroll Transactions (F069116) Report Code that indicates a DBA is reportable for health coverage reporting (Required)

Use this processing option to specify the value of the data item column name (PR01 - PR10) in the Payroll Transactions (F069116) record that identifies medical DBAs.

Enter the Payroll Transactions (F069116) Report Code (PR01-PR10) data item that identifies a DBA as employer-sponsored self-insured health coverage (Required)

Use this processing option to specify the data item column name (PR01 - PR10) in the Payroll Transactions (F069116) record that identifies self-insured DBAs.

Enter the value of the Payroll Transactions (F069116) Report Code that indicates a DBA is employer-sponsored self-insured health coverage (Required)

Use this processing option to specify the value of the data item column name (PR01 - PR10) in the Payroll Transactions (F069116) record that identifies self-insured DBAs.

Employee Master Setup

Employee Master setup is required if you are not using benefits enrollment in a waived plan to indicate an employee waived coverage.

Enter the Employee Master (F060116) Eligibility Code (E001-E010) data item that identifies that an employee was offered health coverage, but waived coverage

Use this processing option to specify the data item column name (E001 - E010) in the Employee Master (F060116) record that identifies waived plans.

Enter the value of the Employee Master (F060116) Eligibility Code that indicates the employee's waived status

Use this processing option to specify the value of the data item column name (E001 - E010) in the Employee Master (F060116) record that identifies waived plans.

Enter the Employee Master (F060116) User Defined Date (ED01-ED20) data item that identifies the start date of the employee's waive of an offer of health coverage for the reporting year

Use this processing option to specify the data item column name (ED01 - ED20) in the Employee Master (F060116) record that identifies the waived plan's starting date.

Enter the Employee Master (F060116) Report Code (ED01-ED20) data item that identifies the end date of the employee's waive of an offer of health coverage for the reporting year

Use this processing option to specify the data item column name (ED01 - ED20) in the Employee Master (F060116) record that identifies the waived plan's ending date.

Note: When using Benefits Administration, you must enroll an employee in a waived plan if the employee waives coverage offered. The waived plan, or waived plan option if you used plan options, should have the Non-Participating Plan Flag set to Yes. See [Setting Up Benefit Plans and DBAs](#) for more information.

Processing

Choose which date will be used when retrieving DBA Detail History (F0719) for each month when determining offer and coverage based on DBA history

Use this processing option to specify which date will be used for retrieving DBA Detail History (F0719) records for the reporting year. The 1095-C Offer and Coverage Workfile Build looks for DBAs that are set up as reportable for health coverage returns (based on the Report Code and value assigned to a DBA) in the DBA Detail History table. For any given month, if the system cannot locate the benefits for an employee enrollment, the workfile build will look for DBA history. Therefore, you can determine employee offers of coverage from the DBA history when JD Edwards Benefits Administration has not been used to perform enrollment.

The system will retrieve all records that have a date that is greater than or equal to the first day of the reporting year, and less than or equal to the last day of the reporting year.

Note:

Any DBA amount found in a month indicates offer of coverage for the month.

If the DBA has a corresponding Employee DBA Instruction (F06106) that was used to calculate the DBA, the month derived from "Effective From Date" (on the F06106) must occur on the first day of that month in order for the month to be considered an offer of coverage. If no F06106 exists, the month is considered to be an offer of coverage. All other months from the F06106 instruction are considered an offer of coverage for those months.

Values are:

- o Blank: Date Worked
- o **1:** Check Date
- o **2:** Pay Period Ending Date

Submit 1095-C Covered Individuals Workfile Build (R08120)

Use this processing option to specify whether the 1095-C Offer and Coverage Workfile Build (R08119) should automatically submit the 1095-C Covered Individuals File Build (R08120) when it is finished processing.

The 1095-C Covered Individuals File Build is required if the employer offers self-insured health coverage.

Values are:

- o Blank: Do not submit R08120
- o **1:** Submit R08120

Submit Offer and Coverage Workfile Report (R08119A)

Use this processing option to specify whether the 1095-C Offer and Coverage Workfile Build (R08119) should automatically submit the 1095-C Offer and Coverage Workfile Report (R08119A) when it is finished processing.

Valid values are:

- o Blank: Do not submit R0119A
- o **1:** Submit R0119A

Assign Code Series 2 values (Form 1095-C, Line 16)

Use this processing option to specify whether the system should populate Series 2 Codes in the Safe Harbor columns (HB00 - HB12) on the 1095C Offer and Coverage (F08119) records generated by the 1095-C Offer and Coverage Workfile Build (R08119).

Valid values are:

- o Blank: Do not populate Series 2 Codes
- o **1:** Populate Series 2 Codes

Assign Code Series 2 (Form 1095-C, Line 16 for January) a value of 2B if employee's Date Started is in January and is other than the first day of January

Use this processing option to specify whether to assign Code Series 2 (Form 1095-C, Line 16 for January) a value of 2B when an employee's Date Started is in January and is other than the first day of January.

Valid values are:

- o Blank: Do No Assign 2B to Line 16
- o **1:** Assign 2B to Line 16

Assign Code Series 2 (Form 1095-C, Line 16) a value of 2D if employee's Date Started is other than the first day of the calendar month

Use this processing option to specify whether to assign Code Series 2 (Form 1095-C, Line 16) a value of 2D when an employee's Date Started is other than the first day of the calendar month.

Valid values are:

- Blank: Do No Assign 2D to Line 16
- **1**: Assign 2D to Line 16

Choose the Review Status value to be written on each Offer and Coverage (F08119) Summary Record. You can use this code to filter records for review in Work with Form 1095-C Information (P08119)

Use this processing option to indicate the Review Status value to use when creating Offer and Coverage Summary Records. This value can be used when reviewing records in Work with Form 1095-C Information (P08119). You can filter records for review based on the review status.

Assign Code Series 2 (Form 1095-C, Line 16) a value of blank when Code Series 1 (1095-C, Line 14) has a value of 1A

Use this processing option to force a value of blank in Line 16 for each F08119 summary record when Line 14 has a value of 1A for the month.

Valid values are:

Blank or Default : system will derive a value for Line 16

1: Assign blank to Line 16

Plan Start Month

Use this processing option to derive the plan start month

Valid values are:

Blank or 00: No plan offered with eligible coverage

01-12: Default Plan Start Month

99: System calculates plan Start Month (based on first month an eligible code appears on line 14)

Note: For processing options referencing assignment of Code Series 2 values and to determine how you choose to set these options, see the IRS Instructions for Forms 1094-C and 1095-C. Relevant sections in the IRS instructions include "Code Series 2-Section 4980H Safe Harbor Codes and Other Relief for Employer," and the documents Definitions section, "Limited Non-Assessment Period."

Setting Processing Options for the 1095-C Covered Individuals Report (R08120)

You set the processing options for the batch version of the R08210 report that you want to run before processing the Covered Individuals File build.

Processing options enable you to specify the default processing for programs and reports.

Defaults

Access the Defaults tab.

Reporting Year

The calendar year for which the ACA Health Coverage Information Return is being produced. This field is mandatory when you run R08120 standalone from the menu or from the batch version.

Employer Tax ID

A number that identifies your company to the tax authority. This number can include the tax ID number for an individual, a federal or state corporate tax ID, a sales tax number, and so on. This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than 9 positions for the tax identification number. Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.

Address Number

A number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

AIR ID

An alphanumeric value similar to a Payroll ID or a W2 ID, which identifies a customer-defined set of AIR records within one reporting year.

Ensure that you enter the AIR ID as it is a mandatory field.

Report Dependents in Part III even if Plan ID/Plan Option is Blank

Use this processing option to specify whether to print all dependents without a Plan ID/Plan Option in their Dependent/Beneficiary enrollment.

Valid values are:

- o Blank/**0** - Match Plan/Option
- o **1** - Print All Dependents

Enter the source for the enrollment begin date for processing Employee Enrollment (F08330) records

Use this processing option to specify the code to indicate which date field on the Employee Enrollment (F08330) record represents the effective beginning date of the employee's offer of coverage.

Valid values are:

- o Blank/**EF**: Effective Starting Date (EFT)
- o **DB**: DBA Begin Date (DTDB)
- o **ED**: Eligibility Date (DELG)
- o **PD**: Participation Date (DPTC)
- o **UD**: User Defined Date (DUSR)

If source of enrollment begin date is blank on employee enrollment, use alternate date as begin date

Use this processing option to specify the alternate code to indicate which date field to use when the source of enrollment begin date is blank on the Employee Enrollment (F08330) record.

Valid values are:

- o Blank/**EF**: Effective Starting Date (EFT)
- o **DB**: DBA Begin Date (DTDB)
- o **ED**: Eligibility Date (DELG)
- o **PD**: Participation Date (DPTC)
- o **UD**: User Defined Date (DUSR)

Enter the source for the enrollment end date for processing Employee Enrollment (F08330) records

Use this processing option to specify the code to indicate which date field on the Employee Enrollment (F08330) record represents the end date of the employee's offer of coverage.

Valid values are:

- Blank/**ET**: Effective Ending Date
- **DE**: DBA End Date
- **UD**: User Defined Date

If the source of enrollment end date is blank on employee enrollment, use alternate date as end date

Use this processing option to specify the alternate code to indicate which date field to use when the source of enrollment end date is blank on the Employee Enrollment (F08330) record.

Valid values are:

- Blank/**ET**: Effective Ending Date
- **DE**: DBA End Date
- **UD**: User Defined Date

Extended Enrollment from Ending Date (EFTE): When using Ending Date (EFTE) as the end of coverage date, indicate if coverage extends beyond that date

Use this processing option to specify the value that indicates how the enrollment end date will be set in order to determine the employee's offer of coverage. This processing option only applies when you use the F08330 Ending Date (EFTE) as the end of coverage date.

Valid values are:

- Blank: Do not adjust the enrollment end date.
- **A**: For the month when enrollment ends and if the employee was terminated before or in that month, assume coverage for the entire month and (nn) months after the enrollment end date.
- **B**: For the month when enrollment ends and if the employee was active in the month, assume coverage for the entire month and (nn) months after the enrollment end date
- **C**: Both A and B apply.

Apply Employee Extended Enrollment From Ending Date values (PO 10) to dependents

Use this processing option to specify that the coverage for dependents should extend past the dependent's enrollment Ending Date (F08336). If you indicate in processing option 10 that the employee's coverage should extend past the employee's enrollment Ending Date (F08330), you can apply the same rule to dependents. This option may be used by employers who end coverage on a certain date even though the coverage continues beyond that date.

Valid values are:

- Blank: Do not adjust dependent's enrollment end date
- **Y**: Adjust the dependent's enrollment end date based on the values indicated in PO 10 (Employee Extended Enrollment From Ending Date)

Creating the 1095-C Covered Individuals File Build (R08120) Report

Access ACA Information Returns, Advanced & Technical Operations menu (G07BACAA), 1095-C Covered Individuals Workfile Build.

The 1095-C Covered Individuals Workfile Build can be run standalone (R08120) or automatically by setting the processing option for the workfile build in R08119.

Note:

If you run the 1095-C Covered Individuals File Build from the menu, you must first have run the 1095-C Offer and Coverage Workfile Build (R08119). If you do not run the R08119 first, there are no F08119 records with which to associate covered individuals and therefore no F08120 records will be created.

If you have already submitted R08120 as a part of the R08119 submission, you do not need to run it standalone.

Creating the Form 1094-C Workfile

To create the Build 1094-C HCIR Workfile (R08121A), access ACA Information Returns, Advanced & Technical Operations menu (G07BACAA), 1094-C Transmittal Workfile Build. In the Work With Batch Versions - Available Versions form, select the version to process and then click Select to build the report.

The R08121A-Build 1094-C Workfile process will:

- automatically add Form 1094-C record in the F08121 workfile for AIR IDs to which you have manually not added the Form 1094-C record.
- ensure that there is an Authoritative Transmittal Form 1094-C record for each taxpayer.
- calculate Full-Time and Total Employee Counts by month for the reporting year for all Authoritative Transmittal 1094-C records.
- create records for Other ALE Members in the F08123- 1094C Other Aggregated ALE Group Members table and populate with Average Full-Time Employee Count for the reporting year.

Note: If a Form 1094-C record already exists for an ALE Member when you run the R08121A process, the JD Edwards EnterpriseOne system updates the 1094C ALE Member Information - Monthly (F08122) and 1094C Other Aggregated ALE Group Members (F08123) tables but does not update the record for the ALE Member in the 1094C ALE Member Information (F08121) table. Therefore, ensure that you run the R08121A report in Proof mode and check the values before running the R08121A report in Final mode.

Prerequisites to Create the Form 1094-C Workfile

Before you run the R08121A build, ensure that the following builds are processed and that the corresponding tables are correctly populated. Incomplete data or no data in any of these tables will result in incomplete data in Form 1094-C.

- R081161 - ACA Employee Eligibility table (F081161)
- R08118 - Periods Of Employment table (F08118)
- R08124 -Hours Worked By Month table (F08124)
- R08119 - 1095-C Offer and Coverage (F08119)

Forms Used to Create the Form 1094-C Workfile

Form Name	Form ID	Navigation	Usage
Work With Batch Versions - Available Versions	W98305WA	On the ACA Information Returns Advanced & Technical Operations menu (G07BACAA), select 1094-C Transmittal Workfile Build	Locate and select the AIR ID that you want to process.

Setting Processing Options for the Build 1094-C HCIR Workfile Report (R08121A)

You set the processing options for the batch version of the R08121A report that you want to run before processing the 1094-C HCIR Workfile build.

Processing options enable you to specify the default processing for programs and reports.

Defaults

Proof or Final Mode

Use this processing option to specify whether the system processes records in proof or final mode.

Valid values are:

- o **Blank or 0** - Run the report in proof mode.
- o **1** - Run the report in final mode.

When you choose final mode, the system creates a report and writes the records to the 1094 C ALE Member Information (F08121) table.

Note: Ensure that you run the report in Proof mode to check the values before running the report in Final mode.

Process Type

Use this processing option to identify the type of ACA transmission to the IRS.

Valid values are:

- o **O** - A transmission containing original Form 1094-C and 1095-C records.
- o **C** - A transmission containing correction Form 1094-C and 1095-C records.

Reporting Year (CCYY)

This processing option identifies the calendar year for which the ACA Health Coverage Information Return is being produced. This is a mandatory field.

Date Option to Consider Employment

This processing option identifies the employment date to consider when generating the employee count.

Valid values are:

- **Blank/A** - The system generates a list of employees employed on the 1st day of the month.
- **B** - The system generates a list of employees employed on the last day of the month.
- **C** - The system generates a list of employees employed on the 12th day of the month.
- **D** - The system generates a list of employees employed on the payroll day or any other day specified for each month in the Days tab.

Reporting Company Contact Code

This processing option identifies the reporting company's contact number to consider and fetch from the Address Book Revisions form when generating the Form 1094-C information.

Phone Number Type for Reporting Company Contact

This processing option identifies the contact phone number to consider when generating the Form 1094-C information.

Do not Print Detailed Information

Use this processing option to specify whether to print the employee detailed information in Form 1094-C.

Valid values are:

- **Blank/0** - The system prints employee level information in Form 1094-C.
- **1** - The system does not print employee level information in Form 1094-C.

Days

January to December

If you have selected value D in the Date Option to Consider Employment field in the Defaults tab, you should specify the employment date to consider in each month, for generating the employee count.

Resetting the Form 1095-C Workfiles

Occasionally it might be necessary to reset and reprocess the entire workfile build. For example, if you discover data errors you must reset and reprocess the entire workfile build.

When you reset the AIR year-end workfiles, the system runs the version of the Reset Offer and Coverage and Covered Individuals program (R08119X) that you enter in the ACA Information Returns Processing Parameters form (P08210) and resets the 1095C Offer and Coverage table (F08119) and the 1095C Covered Individuals table (F08120).

Note: The Reset 1095-C option is enabled in the Row menu of the Work With ACA Information Returns Workbench form, only if you have already run the build for the records.

Setting Processing Options for the Reset Offer and Coverage and Covered Individuals Report (R08119X)

Processing options enable you to specify the default processing for programs and reports.

Process

Delete Protected Records

Use this processing option to specify whether the system should delete protected records from the 1095-C Offer and Coverage (F08119) and the 1095-C Covered Individuals (F08120) tables.

Valid values are:

- Blank: Do not delete protected records
- **1**: Delete protected records

Resetting the Form 1095-C Workfiles

To reset or delete the protected records in the AIR year-end workfiles, you must first set the processing option for the Reset Offer and Coverage and Covered Individuals report (R08119X). If you have set the Protected Record flag to Yes on any records, and you do not want a reset to delete them, you can set the Delete Protected Records processing option to blank. Then, reset the build from the Row menu of the Work With ACA Information Returns Workbench (*1094-C And 1095-C -> Reset 1095-C -> Submit*).

The Build Form 1095-C Status will change from 1 to blank in the Work With ACA Information Returns Workbench. You can now run the AIR year-end workfile build again.

Note: You cannot run the reset for AIR IDs that have been submitted to the IRS.

6 Reviewing ACA Information Returns (AIR) Workfile Information

Reviewing the AIR Year-End Workfiles

After you create Affordable Care Act Health Coverage Information Returns (AIR) year-end workfiles, you review the information in the workfiles for accuracy. If required, you can revise the information and re-create the workfiles to ensure that the correct information prints on the year-end forms (Form 1095-C).

You can also edit records created by the workfile build process, or manually create new records or delete records in the workfile using the Work with Form 1095-C Information program (P08119).

This chapter provides an overview of workfile reviews and discusses how to:

- Edit records in the workfile.
- Manually add records to the workfile.
- Delete records from the workfile.
- Import records to the workfile.

Understanding the AIR Year-End Workfiles Information

The 1095-C workfiles contain data necessary for AIR reporting and also contain additional information that identifies an employee's enrollment, such as plan ID, plan option, and enrollment dates.

From the Work with Form 1095-C Information form, you can access data in the 1095C Offer and Coverage (F08119) and 1095C Covered Individuals (F08120) tables. The Form 1095-C form displays data in a format similar to the Form 1095-C.

The Build 1094-C HCIR Workfile contains data necessary to report summary information for each employer and to transmit Forms 1095-C to the IRS.

From the Work with Form 1094-C form, you can access data in the 1094 C ALE Member Information (F08121), 1094C ALE Member Information - Monthly (F08122), and 1094C Other Aggregated ALE Group Members (F08123) tables. The Form 1094-C form displays data in a format similar to the Form 1094-C.

Working with Form 1095-C Workfiles Information

This section provides an overview of the Work with Form 1095-C Information program and discusses how to use the application to:

- Review information created by the Form 1095-C workfile build processes
- Edit records and manually add new records in the workfiles
- Delete records from the workfiles
- Import records into the workfiles

Understanding Form 1095-C Information

You use the Work with Form 1095-C Information program (P08119) to inquire on data in the 1095-C Offer and Coverage Workfile and 1095-C Covered Individuals File or to add, modify, and delete records in the workfiles. You can also import records to the workfiles and modify as required before printing Form 1095-C.

Note:

The Form 1095-C batch processes create records for employees and does not create records for individuals who have not been employees. If you need to produce a Form 1095-C for a recipient who is not an employee, you can add or import records to the reporting workfiles. Before you add or import a record for a recipient who is not an employee, you must create an Address Book record to identify the recipient.

When creating a record using the Work with Form 1095-C Information program, the following information is mandatory:

- AIR ID
- Employee Number
- Tax ID
- Year

When you run the Work with Form 1095-C Information program (P08119), the system retrieves AIR year-end workfiles information from the F08119 and F08120 tables. If you make any changes to the information, the system updates these two tables.

The Work with Form 1095-C Information program (P08119) initially displays only the summary records, which can be edited either through the Form 1095-C Part II and Part III form, the Offer and Coverage Detail Form, or the Covered Individuals Detail form. The header and Part II information in the form are retrieved from the F08119 table and Part III information is retrieved from the F08120 table.

When you add a record to a workfile table, the system assigns a control number (a unique identifier) for the record. If you are adding Form 1095-C data that includes F08120 Part III data, you should add the F08119 Part I and II data first. When the system creates a control number for a record, it checks for the instance in the F08119 table and if available, uses the same control number for the record in the F08120 table. Therefore, to import a record into the workfile, ensure that you first import the data for the 1095C Offer and Coverage table (F08119) followed by the data for the 1095C Covered Individuals table (F08120).

Deleting Records from the Workfiles

When you delete a record from the 1095C Offer and Coverage table (F08119), the system deletes the corresponding record from the 1095C Covered Individuals table (F08120) table. Also, when you delete a summary record, the system deletes the corresponding detail records.

After you submit Form 1095-C to the IRS, you cannot delete records from the 1095C Offer and Coverage table or the 1095C Covered Individuals table.

You cannot delete covered individuals records from the Work with Form 1095-C Information form or the 1095-C Part II and Part III form. To delete a record from the 1095C Covered Individuals table (F08120) table, select the record from the Work with Form 1095-C Information form or the 1095-C Part II and Part III form and access the Covered Individuals Detail form.

If you manually update any information in a record, flag it as protected if you do not want any subsequent batch processes to update or delete the record. You can set the Protected flag individually for records in the 1095C Offer and Coverage table (F08119) and the 1095C Covered Individuals table (F08120).

From the Work with Form 1095-C Information form, you can go to the following forms:

- Form 1095-C Part II and Part III
- ACA Eligibility
- Employee Information
- Offer and Coverage Detail
- Covered Individuals Detail
- Import Offer and Coverage
- Import Covered Individuals
- Additional Information
- Work With Enrollment With Eligibility
- Enrollment Overrides

Understanding 1095-C Covered Individuals Report (R08120)

As a Benefits Administrator, you run the 1095-C Covered Individuals Workfile Build to include information about covered individuals including any employee (full-time or not full-time) and their family members who are enrolled in a self-insured plan, in Part III of Form 1095-C. If you do not have any self-insured plans, you do not need to run the R08120 process build.

On running R08120, the system retrieves information from the participant table (F08901) and the Dependent/Beneficiary Cross-Reference table (F08336) and updates the records in the 1095C Covered Individuals table (F08120). This table contains the Detail records by Home Company and Summary records by Tax ID, for each employee and their dependents. The Covered Individuals table provides information for reporting covered individuals in Part III of Form 1095-C and can be managed from the 1095-C Offer and Coverage program (P08119).

You can also import data from a third-party administrator or other source into the workfile by using the standard functionality of importing grid data on the Import Covered Individuals form.

Forms Used to Manage Form 1095-C Information

Form Name	Form ID	Navigation	Usage
Work with Form 1095-C Information	W08119A	On the ACA Information Returns Inquiries menu (G07BACA1), select Form 1095-C Information.	Select an AIR record.
Form 1095-C Part II and Part III	W08119D	On the Work with Form 1095-C Information form, click Add. OR Select an AIR ID and click Select.	Create a new Form 1095-C record, or update an existing Form 1095-C record.
Offer and Coverage Detail	W08119C	On the Work with Form 1095-C Information form, select an AIR record and then select Offer/Cov Detail from the Form menu. OR On the Form 1095-C Part II and Part III form, select Offer Cov. Detail from the Form menu.	Simultaneously edit and delete Part II data for multiple records from the F08119 table. This form lists summary and detail records; only summary records can be edited.
Covered Individuals Detail	W08119E	On the Work with Form 1095-C Information form, select an AIR record and then select Covered Individuals from the Form menu. OR On Form 1095-C Part II and Part III select Covered Ind. from the Form menu.	Simultaneously edit and delete Part III data for multiple records from the F08120 table. This form lists summary and detail records; only summary records can be edited.
Additional Information	W08119B	On the Form 1095-C Part II and Part III form, select Additional Info from the Form menu.	Review additional details about the record.
Import Offer and Coverage Summary Information	W08119C	On the Work with Form 1095-C Information form, select Import Offer/Cov. from the Form menu.	Import summary records for offer and coverage reporting.

Form Name	Form ID	Navigation	Usage
Import Covered Individuals Summary Information	W08119E	On the Work with Form 1095-C Information form, select Import Covered Ind. from the Form menu.	Import summary records for covered individuals reporting.
Work With Enrollment With Eligibility	W08334A	On the Work with Form 1095-C Information form, select an AIR record in the detail area and then select Enrollment w. Elig. from the Form menu.	Enroll employees using eligibility. See "Enrolling Employees Using Eligibility" in the <i>JD Edwards EnterpriseOne Applications Benefits Implementation Guide</i> .
Enrollment Overrides	W08330B	On the Work with Form 1095-C Information form, select an AIR record in the detail area and then select Enrollment Overrides from the Form menu.	Enroll employees using overrides. See "Enrolling Employees Using Overrides" in the <i>JD Edwards EnterpriseOne Applications Benefits Implementation Guide</i> .

Adding or Updating 1095-C Information

Access the Work with Form 1095-C Information form and click Add to view the Form 1095-C Part II and Part III form.

AIR ID

An alphanumeric value similar to a Payroll ID or a W2 ID, which identifies a customer-defined set of AIR records within one reporting year.

Employer Tax ID

A number that identifies your company to the tax authority. This number can include the tax ID number for an individual, a federal or state corporate tax ID, a sales tax number, and so on. This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than 9 positions for the tax identification number. Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.

Reporting Company

The company under which this Form 1094-C/1095-C will be reported. The Reporting Company details are used to obtain the name and address information for the Federal Employer Identification Number (FEIN). The Reporting Company is the employer, which is equivalent to the ALE Member (Applicable Large Employers Member) for purposes of Affordable Care Act Health Coverage Information Returns (AIR) reporting.

Reporting Year

The calendar year for which the AIR is being produced.

Address Number

A number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Corrected

A flag to indicate if Form 1095-C has been corrected.

Blank: The form has not been corrected.

X: The form has been corrected.

Void

A flag to indicate if Form 1095-C has been voided.

Blank: The form has not been voided.

X: The form has been voided.

Note: This value is currently informational only and its use has not been defined by the IRS.

Control Number

This field is a unique number used to identify a record in a file.

Record Type

Indicates whether the Affordable Care Act (ACA) work file record is a summary record used to report information to the IRS and other agencies or a detail record used to support the information reported. Record Type 1 indicates a Detail record and Record Type 2 indicates a Summary record.

Protected

A flag to indicate that a record has been manually modified and the subsequent batch processes should not change the existing record.

Blank: The record has not been manually modified.

X: The record has been manually modified and subsequent batch processes should not update it.

Record Origination

A code to indicate the source of a 1095-C Offer and Coverage record.

C: Indicates that the record was computer generated during the 1095-C Offer and Coverage Workfile Build Process.

M: Indicates that the record was manually entered into the Form 1095-C Information application(P08119). If records are imported, they should be imported with the value M.

Self-Insured Coverage

A flag to indicate whether the employer offers employer-sponsored self-insured health coverage in which the employee or other individuals are enrolled.

Blank: The employer does not provide self-insured coverage.

X: The employer does provide self-insured coverage.

Review Status

A user-defined code (08/RV) that allows the user to flag records that may or may not need further review.

Last Date Started

The date on which the employee reported to work in the most recent period of hire.

The default original hire date is when an employee initially begins working. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker.

For the calculation tables in the Payroll system and the eligibility tables and date codes in the Human Resources system, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.

Last Date Terminated

The date on which the employee was terminated, if applicable.

Employee's Age on January 1

The age of the employee as on January 1 of the current year. The employee age is required only if the employee is offered an individual coverage HRA.

Offer of Coverage (enter required code)

Enter the IRS-defined Code Series 1 indicator that specifies the type of coverage, if any, offered to an employee, the employee's spouse, and the employee's dependents. If the code applies for all 12 months of the reporting year, enter the code in the All 12 Months box; otherwise, enter the code in the respective month's box.

Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage

The amount of the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee. If the value applies for all 12 months of the reporting year, enter the value in the All 12 Months box; otherwise, enter the code in the respective month's box.

Applicable Section 4980H Safe Harbor (enter code, if applicable)

The IRS-defined Code Series 2 indicator to report that one of the following situations applied to the employee for all 12 months of the calendar year:

- The employee was not employed.
- The employee was not a full-time employee.
- The employee enrolled for the minimum essential coverage offered.
- The employee was in a Limited Non-Assessment Period.
- Non-calendar year transition relief applied to the employee.
- The employee met one of the 4980H affordability safe harbors.
- The employer was eligible for multiemployer interim rule relief.

If the safe harbor code applies for all 12 months of the reporting year, enter the value in the All 12 Months box; otherwise, enter the code in the respective month's box.

ZIP Code

The applicable ZIP code your employer uses for determining the availability for an individual coverage HRA. If code 1L, 1M, or 1N is used in Line 14, the ZIP code will be the employee's primary residence location. If code 1O, 1P, or 1Q is used in Line 14, the ZIP Code will be the employee's primary work location. Line 17 will be blank for any other code that is entered in Line 14.

We can override the values provided in the build report and manually update the 1095C form.

Importing 1095-C Offer and Coverage and Covered Individuals Information

Access these forms to import offer and coverage and covered individuals details for a record:

- Import Offer and Coverage Summary Information - to import summary records for offer and coverage details.
- Import Covered Individuals Summary Information - to import summary records for covered individuals details.

Importing to 1095C Offer and Coverage table (F08119)

When importing records to the 1095C Offer and Coverage table (F08119), you must ensure that imported records have a valid Address Book number.

If you are importing records for non-employees, such as non-employee COBRA participants, prior year retirees under medical plans, or other form recipients, you must first create an Address Book record for those form recipients. Address Book number is a part of the table key, and the address book record is used for entering Form 1095-C Part I name and address information.

Importing to 1095C Covered Individuals table (F08120)

When importing records to the 1095C Covered Individuals table, you must ensure that related 1095C Offer and Coverage (F08119) records exist. The F08120 records are dependent on the F08119 records.

When importing covered individuals from an external source, the covered individuals do not require an Address Book number (PAN8) in the JD Edwards Address Book. This field can be left blank.

Note: For more information, see My Oracle Support Document ID [2065515.1](#).

Working with Form 1094-C Workfile Information

This section provides an overview of the Work with Form 1094-C program and discusses how to use the application to:

- Review information created by the Form 1094-C workfile build process
- Edit records and manually add new records in the workfile
- Delete records from the workfile
- Import records into the workfile

Understanding Form 1094-C Information

You use the Work with Form 1094-C program (P08121) to inquire on data in the Build 1094-C HCIR Workfile to add, modify, and delete records in the workfile. You can also import records to the workfile and modify as required before Form 1094-C transmission.

When you run the Work with Form 1094-C program, the system retrieves Build 1094-C HCIR Workfile information from the F08121, F08122, and F08123 tables. If you make any changes to the records, the system updates these tables.

If you create a new record using the Work with Form 1094-C program, the system creates the new record in the F08121 and F08122 tables. The F08123 table is a system generated table and is created only when you run the R08121A build process.

Components of Form 1094-C

Part I of Form 1094-C pertains to information regarding the employer or ALE Member who is filing Form 1094-C or on whose behalf the form is filed.

Part II, III, and IV of Form 1094-C are applicable and enabled only if the Form 1094-C is an Authoritative Transmittal form. Part IV of Form 1094-C is only required if the ALE Member is part of an Aggregated ALE Group.

Only one Form 1094-C can be the Authoritative Transmittal form for an ALE Member in a filing year.

Forms Used to Manage Form 1094-C Information

Form Name	Form ID	Navigation	Usage
Work with Form 1094-C	W08121B	On the ACA Information Returns Processing menu (G07BACAP), select Work with Form 1094-C.	Select an AIR record.
1094-C	W08121C	On the Work with Form 1094-C form, click Add. OR Select an AIR ID and click Select.	Create a new Form 1094-C record, or update an existing Form 1094-C record.

Creating or Updating Form 1094-C Information

The Work with Form 1094-C program (P08121) provides information about the ALE Members. The records displayed are fetched from these tables:

- F08121 - 1094 C ALE Member Information
- F08122 - 1094C ALE Member Information - Monthly
- F08123 - 1094C Other Aggregated ALE Group Members

Access the Work with Form 1094-C form and click Add to view the 1094-C form. Enter the details in this form to create the record. The system saves the records in the F08121 and F08122 tables. The 1094C Other Aggregated ALE Group Members table (F08123) is created only when the R08121A report is created.

Part I - Applicable Large Employer Member

AIR ID

Enter an alphanumeric value similar to a Payroll ID or a W2 ID, which identifies a customer-defined set of AIR records within one reporting year.

Reporting Company

The company under which this Form 1094-C/1095-C will be reported. The Reporting Company details are used to obtain the name and address information for the Federal Employer Identification Number (FEIN). The Reporting Company is the employer, which is equivalent to the ALE Member (Applicable Large Employers Member) for purposes of Affordable Care Act Health Coverage Information Returns (AIR) reporting.

The address of the employer must match the address on the corresponding Forms 1095-C.

Government Entity

Enter the Address Book number of the Designated Government Entity (DGE) that is part of or related to the Governmental Unit.

Government employers can designate a sister agency as the reporting entity for all returns related compliance requirements.

Note: You can skip Line 9 through 16, of Form 1094-C, if you are not a government employer or not using a DGE for reporting.

Reporting Year

The calendar year for which the AIR is being produced.

Rep. Company Contact

Enter the Address Book number of the contact for the Reporting Company.

Government Entity Contact

Enter the Address Book number of the contact for the Designated Government Entity (DGE).

Employer Tax ID

A number that identifies your company to the tax authority. This number can include the tax ID number for an individual, a federal or state corporate tax ID, a sales tax number, and so on. This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than 9 positions for the tax identification number. Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.

1095-C Forms Count

Enter the total number of Forms 1095-C submitted with the associated Form 1094-C transmittal.

Corrected

When you correct a Form 1094-C, the system automatically checks the Corrected flag on the original Form 1094-C and creates a new record with the corrected values using the Correction AIR ID.

Valid values are:

Blank: The form has not been corrected.

X: The form has been corrected.

Authoritative Transmittal

Enter **X** to indicate whether this Form 1094-C is the authoritative transmittal for the ALE Member.

Valid values are:

Blank: The 1094-C Form is not the authoritative transmittal for the ALE Member.

X: The 1094-C Form is the authoritative transmittal for the ALE Member.

Note: There can be only one authoritative transmittal for an ALE Member.

Part II - ALE Member Information

ALE Member Information is only required on the Authoritative Transmittal Form 1094-C.

Auth Transmittal Form Count

Enter the total number of Forms 1095-C that are filed by and on behalf of the employer for all Form 1094-Cs.

Aggregated ALE Group

Enter **X** if the employer was a member of an Aggregated ALE Group during any month of the reporting calendar year.

If you enter X, Part IV of Form 1094-C is enabled.

Part III - ALE Member Information Monthly

ALE Member Monthly Information is only required on the Authoritative Transmittal Form 1094-C.

(a) Minimum Essential Coverage Offer Indicator

Enter **X** in the All 12 Months corresponding Yes box if you offered minimum essential coverage to at least 95% of your full-time employees and their dependents for the entire calendar year.

If you offered minimum essential coverage to at least 95% of you full-time employees and their dependents only for certain months of the calendar year, enter **X** in the Yes column's boxes corresponding to those months. For the remaining months that you did not offer coverage, enter **X** in the No column's boxes corresponding to those months.

Note: An employee in a Limited Non-Assessment Period is not considered when determining the percentage of employees to whom minimum essential coverage was offered.

(b) Full-Time Employee Count for ALE Member

Displays the number of full-time employees for each month excluding employees in a Limited Non-Assessment Period. This value is populated automatically from the Build 1094-C Workfile (R08121A) process.

(c) Total Employee Count for ALE Member

For each month, displays the total number of employees including your full-time employees, non full-time employees, and employees in a Limited Non-Assessment Period. This value is populated automatically from the Build 1094-C Workfile (R08121A) process.

(d) Aggregated Group Indicator

If the ALE member was a member of an Aggregated ALE Group for all or any month of the reporting calendar year, enter **X** in the All 12 Months box or the corresponding month's box as appropriate.

This field is enabled only if you have selected the Aggregated ALE Group field in Part II of the 1094-C form.

(e) Section 4980H Transition Relief Indicator

If you have selected Section 4980H Transition Relief flag (Part II) indicating that you are eligible for the transition relief, enter:

- o **A** to specify that you are eligible for the 50 to 99 Relief.
- o **B** to specify that you are eligible for the 100 or More Relief.

Part IV - Other ALE Members of Aggregated ALE Group

Name and EIN

Part IV of Form 1094-C is populated automatically by the Build 1094-C Workfile (R08121A) process. You can also add and delete individual records manually. If entering the record manually, enter the names and EIN of other ALE members of the Aggregated ALE Group. You can enter names of up to 30 Aggregated ALE Group members.

If there are more than 30 ALE Members, report the 30 biggest ALE Members as determined by average full-time employee (FTE) count.

Note: Part IV of Form 1094-C is enabled only if you have selected the Aggregated ALE Group field in Part II.

Adding ALE Members that are not JDE Companies

To add the Name and EIN of other ALE Members that are not JD Edwards companies and are not added in the JD Edwards EnterpriseOne system, create a UDC value in the UDC table **08/XC** to identify and populate the Name and EIN of the business entity.

To create the UDC value in **08/XC**, enter the nine-digit Federal EIN of the other ALE Member and then enter the company name in the Description1 field.

7 Producing AIR Year-End Deliverables

Understanding the AIR Year-End Reporting Process

After you review the Affordable Care Act Health Coverage Information Returns (AIR) workfiles (Forms 1095-C and Form 1094-C) information online and make any necessary corrections, print the forms and review them for accuracy.

The year-end reporting process includes:

- Printing Forms 1095-C for employees
- Resetting Forms 1094-C and 1095-C if any error is identified in the forms
- Building the transmission XML files (Form Data XML and Manifest XML files)
- Uploading the AIR XML files to the IRS (ACA Information Returns Program)
- Replacing rejected transmissions
- Correcting accepted transmissions to fix errors reported by the IRS or employer and submitting the corrections

Form 1095-C

The JD Edwards EnterpriseOne system supports printing Forms 1095-C for employees/recipients using the BI Publisher template. The system does not support paper filing to the IRS or printing Form 1095-C for the IRS form format or any other pre-printed form format. The JD Edwards EnterpriseOne system only supports electronic filing to the IRS.

Form 1095-C should be provided to each employee who was employed by the ALE Member and who was a full-time employee for any part of the year. In addition, employees enrolled in self-insured coverage should also receive a Form 1095-C, regardless of their full-time status. Each ALE Member must print only one Form 1095-C for each full-time employee.

An employee working for more than one ALE Member will receive a Form 1095-C from each employer.

When printing Form 1095-C:

For	Verify that Form 1095-C
Full-time employees	Part I and Part II are completed.
Full-time employees covered by a self-insured plan	Part I, Part II, and Part III are completed.
Part-time employees covered by a self-insured plan	Part I and Part III are completed and Code 1G is entered in the All 12 Months column on Line 14 in Part II of the form.

Form 1094-C Authoritative Transmittal Form

Form 1094-C is a cover sheet that must accompany Forms 1095-C sent to the IRS. As an ALE Member, you must submit your own Form 1094-C. You can submit any number of Forms 1094-C but only one of them can be the Authoritative Transmittal form.

The Form 1094-C - Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns contains summary information for each employer about the health coverage offered to the employees. The Form 1094-C includes counts of total and full-time employees by month.

Printing Forms 1095-C

This section provides an overview of AIR year-end forms, lists prerequisites, and discusses how to:

- Print Form 1095-C.
- Set processing options for the Print 1095-C program (R08119B).
- Reset Form 1095-C.

Forms Used to Print Forms 1095-C

Form Name	Form ID	Navigation	Usage
Work With ACA Information Returns Workbench	W08210A	On the ACA Information Returns Processing menu (G07BACAP), select ACA Information Returns Workbench.	Select an AIR year-end version to print.

Setting Processing Options for the Print 1095-C Program (R08119B)

Processing options enable you to specify the default processing for programs and reports.

Process

Print Addresses

Enter a value to specify whether to print the mailing and return addresses (employer's and employee's addresses) on the back of the form.

Valid values are:

- Blank: Do not print the mailing and return addresses

Note: If you select this option, the system does not print anything on the back of the form, including the instructions.

- **1:** Print the mailing and return addresses

Note: You can choose to print address information if you plan to fold the form for inserting into a two-window envelope for mailing. The JD Edwards EnterpriseOne form template, folded in half, is compatible with double-window envelope 7985E. For more information, see My Oracle Support Document ID [2065467.1](#).

Mask SSN

Enter a value to specify whether to mask the first five digits of the SSN on printed Forms 1095-C.

Valid values are:

- Blank: Do not mask SSN in Form 1095-C.
- **1:** Mask SSN in Form 1095-C.

Contact Telephone Number

Enter the telephone number for the ALE Member contact. You can use any applicable telephone number format for a country. This field is used with the Prefix field (AR1), where you enter the first segment of the telephone number, which is called the area code in the United States.

Print Check Route Code

Use this processing option to specify whether or not the employee's check route code should be printed to the right of the employee's address, on both sides of Form 1095-C.

- Blank: Do not print the employee's check route code
- **1:** Print the employee's check route code

Note: Use version **XJDE0002** if you want to sequence the print using the employee's check route code.

Use Date of Birth for Dependent

Use this processing option to specify that the dependent's Date of Birth should be printed instead of the Social Security Number (SSN) in the Covered Individual's section of the Form 1095-C.

- Blank: Do not print the Date of Birth if an SSN is available for a covered individual. (Default)
- **1:** Print the covered individual's Date of Birth even if an SSN is available

Note: If value 1 is entered and the Date of Birth is not available, then the SSN is printed.

Who's Who

Alternate Address Type

Use this processing option to specify the Alternate Address Type code from user-defined code (UDC) 01/AT. Use UDC 01/AT to define the company address to be printed on the reverse side of Form 1095-C, if different from the company issuing Form 1095-C.

Alternate Address Type is a feature available in the Address Book Who's Who where you can specify different addresses for different purposes as defined in UDC 01/AT.

If you want to use an alternate company address for ACA, set up a new value **A** in Address Type (01/AT) UDC table. For example you can set up Alternate Address Type code as in this table.

Codes	Description 01	Description 2	Special Handling Code	Hard Coded
A	Affordable Care Act	Company Mailing Address	N	N

When this processing option is set, the system uses the value entered in this processing option along with the company Address Book number to find the entry in the Alternate Address table (F01161). If the matching entry is found, the address in F01161 is printed on Form 1095-C.

If this processing option is left blank, the system prints the company address from the Address by Data table (F0116)

Prerequisites

Printing Form 1095-C from the Workbench

Access the Work With ACA Information Returns Workbench.

1. Find and select the AIR ID record in the Work With ACA Information Returns Workbench.
2. From the Row menu, select 1094-C and 1095-C -> Print Form 1095-C -> Submit.

The R08119B batch process generates the PDF output and updates the status to 1 in the Print Form1095-C Status column.

You can print forms for an entire version or for a selected group of employees, based on the version data selections.

Note: To print Form 1095-C from the batch version, create a version and associate or copy it with the provided template and report definition, and then submit. The JD Edwards EnterpriseOne system provides the form template and the report definition to use.

Note: JD Edwards recommends that you be on the latest JD Edwards Tools release for optimal performance with BI Publisher. BI Publisher has limitations on the size of PDF output. Depending on your tools release and system settings, you might need to print Form 1095-C in batches if you have a high volume of forms.

Resetting Form 1095-C

You reset Form 1095-C to correct inaccurate form information when you have not yet reported year-end data to the IRS and to employees. Example: An employee's address change does not appear on Form 1095-C that you just printed because the new address is not yet entered into the Payroll system. If you have not yet distributed Form 1095-C to the

employees or reported the returns information to the government, then you can enter the address change, reset the 1095-C forms, and reprint them.

You might also need to reset AIR year-end forms when information does not align and print properly on the forms.

You can reset and reprint AIR year-end forms for an entire version or for a selected group of employees, based on the version data selections.

To Reset Form 1095-C

1. Find and select the AIR ID record in the Work With ACA Information Returns Workbench.
2. From the Row menu, Process 1095-C -> Reset 1095-C -> Submit.

The system updates the status from 1 to 0 in the Build Form 1095-C Status column.

Correcting Paper Forms 1095-C

Once Forms 1095-C have been distributed to employees, but before electronic filing with the IRS, if you find that you need to make corrections, you make these corrections to the original workfile records and reprint the paper forms. Write the word "CORRECTED" on the reprinted forms. You do not check the CORRECTED flag unless you are making corrections to Forms 1095-C that have been accepted by the IRS.

Correction forms are generated and submitted to correct the previously filed and accepted year-end forms.

This section discusses corrections to paper Forms 1095-C distributed to employees, and describes how to correct data in printed Forms 1095-C.

Correcting Printed Forms 1095-C

If correcting information on a Form 1095-C that was distributed to the recipient, a corrected Form 1095-C must be sent to the recipient. After correcting the information, if the Form 1095-C has not yet been submitted and accepted by the IRS, print the Form 1095-C again and write the word "CORRECTED" on the paper Form 1095-C.

If the Form 1095-C has been accepted by the IRS, the printed correction Form 1095-C will be generated with an X in the CORRECTED box.

Furnish the employee with a copy of the corrected Form 1095-C.

Note: For more information, refer to the Instructions for Forms 1094-C and 1095-C document on the IRS website. (See sections, Alternative Method of Furnishing Form 1095-C to Employees under the Qualifying Offer Method or Alternative Method of Furnishing Form 1095-C to Employees under the Qualifying Offer Method Transition Relief.)

Creating and Reviewing Forms 1094-C/1095-C Transmissions

This section discusses the electronic transmission process and describes how to file Forms 1094-C/1095-C electronically.

Note: JD Edwards EnterpriseOne supports electronic submission of Forms 1094-C and 1095-C. It does not support paper filing of ACA Information Returns to the IRS. The system only supports printing Form 1095-C for employees/recipients.

Understanding the Electronic Transmission and Submission Process

To transmit a Form Data File, a transmitter must have an active Transmitter Control Code (TCC) and should be approved to submit Information Returns to the IRS. As a transmitter, you log in to the IRS Integrated Enterprise Portal (IEP), access the URL for AIR, and then select the option to transmit the Form Data XML file and Manifest XML file.

Note: To file ACA Forms 1094-C/1095-C electronically with the ACA Information Returns (AIR) system, you must:

- First apply for and receive an AIR System Transmitter Control Code (TCC)
- Pass a one-time communications test
- Have a valid Employer Identification Number (EIN)

Note: If you do not have an Employer Identification Number (EIN), you cannot file your returns electronically.

Note: Please refer to IRS Publication 5165, Guide for Electronically Filing Affordable Care Act (ACA) Information Returns for Software Developers and Transmitters.

As a Transmitter, you must upload two xml files for each transmission.

- Manifest XML File- This XML file contains information about the transmission and attribute information about the Form Data File. IRS validates this file before accepting the transmission.
- Form Data XML File - This XML file contains Form 1094-C and corresponding Forms 1095-C data. A single transmission is contained in one Form Data XML file.

Each Form 1094-C and its associated Forms 1095-C are defined as a submission within the transmission. You may have multiple submissions in each transmission.

Once the transmission Manifest XML and Form Data XML files are uploaded, the IRS generates a Receipt ID which is returned to the transmitter. The Receipt ID is only an acknowledgment that IRS has received the transmission. Use the Receipt ID to request the acknowledgment of acceptance or rejection of the transmission.

Note: It is important to note this Receipt ID, as it will be used later to inquire on the transmission status and will also be needed in case of corrections.

Transmission and Submission Definitions and Limitations

A transmission is defined as a package of electronic AIR Documents consisting of one Form Data XML file and an accompanying Manifest XML file sent to the IRS. The Form Data XML file contains the Form 1094-C/1095-C information. The Manifest XML file contains transmitter information and summary information about the Form Data XML file.

Transmissions:

- A transmission consists of one or more submissions.
- A transmission cannot have both original and correction submissions in the same transmission.
- The Form Data XML file may not exceed 100 MB of uncompressed native XML.

Submissions:

- A submission consists of one Form 1094-C and accompanying Forms 1095-C.
- A correction to an Authoritative Transmittal Form 1094-C does not have accompanying Forms 1095-C.
- The reported number of Form 1095-Cs information returns on the Form 1094-C transmittal form must match the actual number of information returns. The JD Edwards EnterpriseOne system calculates this number automatically.
- If a submission is larger than 100 MB, the JD Edwards EnterpriseOne system splits the transmission into two or more transmissions in the following way:
 - The first transmission contains as many submissions as will fit within the 100 MB limit. A submission may be split into multiple transmissions to meet this limit.
 - The subsequent submission(s) will include Forms 1094, and as many associated Forms 1095 as can be contained without exceeding the 100 MB size limit.

Note: The IRS estimates that a single transmission will be able to hold between 10,000 and 15,000 information returns.

Submitting Records to the IRS

You transmit each transmission (Form Data XML file and accompanying Manifest XML file) by logging into the AIR system and selecting the TRANSMIT button. A Web page is provided to browse and select the XML files, and upload.

After transmitting a Manifest XML file and Form Data XML file, the IRS will respond with a Receipt ID. Record the Receipt ID - you use this Receipt ID to check on the status of the transmission. Once the transmission is processed, the IRS will return one of these transmission statuses:

- **A:** Accepted
- **E:** Accepted with Errors
- **P:** Partially Accepted
- **R:** Rejected

Both **A** and **E** transmission statuses are considered "accepted". Partially accepted transmissions indicate that one or more submissions was rejected, and one or more submissions was accepted. Rejected transmission status indicates that all submissions in the transmission were rejected. A rejected transmission or submission must be resubmitted or replaced, while an accepted submission may only be corrected with a correction transmission/submission.

A 1094-C or 1095-C record requires a formal correction if the Submission Status on the Submission record (SUIRSS in the file F08212) for the 1094-C/1095-C record is one of the following:

- **A:** Accepted
- **E:** Accepted with Errors

If submitted, and the status of the submission is blank, no change or delete to Form 1094-C or Form 1095-C records is allowed because the transmission or submission is in progress.

If you delete a Form 1094-C/1095-C record after submission to the IRS, the JD Edwards EnterpriseOne system does not create a correction record.

Note: To add covered individuals to the 1095C Covered Individuals table (F08120), use the Import Covered Individuals Summary Information form.

Transmission and Submission Replacement Process

You must create and submit a replacement transmission when your transmission is rejected by the IRS. A rejected transmission replacement must include all the records submitted initially.

A rejected submission replacement needs to only contain the records from the initial submission that was rejected. Accepted submissions in the original transmission do not need to be replaced.

Forms Used to Work with Form 1094-Cs

Form Name	Form ID	Navigation	Usage
Work With ACA Information Returns Workbench	W08210A	On the ACA Information Returns Processing menu (G07BACAP), select ACA Information Returns Workbench.	Select an AIR year-end version.
Select 1094/1095-Cs for Transmission	W08140A	On the ACA Information Returns Processing menu (G07BACAP), select Select 1094/1095-Cs for Transmission.	Review 1094-C forms. Create ACA Transmission (F08211) and ACA Submission (F08212) records for the selected 1094-C record.
Work with ACA Transmissions	W08140E	On the Select 1094/1095-Cs for Transmission form, select a Form 1094-C record and then select Build Transmissions from the Form menu.	Submit the selected Form 1094-C record for transmission.
Work with ACA Submissions		On the Work with ACA Transmissions form, select the transmission record and then select Review Submissions from the Row menu.	Review submissions attached to the selected transmission.

Select 1094/1095-Cs for Transmission (P08140)

Use the Select 1094/1095-Cs for Transmission program (P08140) to find and select one or more 1094-C records and view the status of a Form 1094-C/1095-C transmission and submit Forms 1094-C/1095-C for transmission.

The build transmission process creates the Form Data XML file and accompanying Manifest XML file. When you select 1094-C records for inclusion in a transmission build:

- select original Form 1094-Cs or correction Form 1094-Cs, but do not combine original and correction records in the same transmission.
- you can select Form 1094-Cs from multiple taxpayers.
- if you select Form 1094-Cs which would result in a Form Data XML file that is larger than 100 MB, the build transmission process will automatically create multiple Form Data XML files and Manifest XML files.

Access the Select 1094/1095-Cs for Transmission form.

Reporting Year

The calendar year for which the ACA Health Coverage Information Return is being produced.

AIR ID Type

Value identifying the type of ACA transmission to the IRS.

Valid values are:

O: A transmission containing original Form 1094-C and 1095-C records

C: A transmission containing correction Form 1094-C and 1095-C records

Show Corrected Records

A flag that indicates whether you want to view corrected Form 1094-C records.

Tax ID

A number that identifies your company to the tax authority. This number can include the tax ID number for an individual, a federal or state corporate tax ID, a sales tax number, and so on.

This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than 9 positions for the tax identification number.

Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.

Reporting Company

The company under which this 1094-C/1095-C will be reported. The Reporting Company details are used to obtain the name and address information for the Federal Employer Identification Number (FEIN).

This is equivalent to an Employer Tax ID, and equivalent to an ALE Member of an Aggregated ALE Group, or an ALE if the ALE contains a single member.

Authoritative Transmittal Flag

A flag to indicate whether Form 1094-C is the authoritative transmittal for the ALE Member.

- Blank - The 1094-C is not the authoritative transmittal for the ALE Member
- **X** - The 1094-C is the authoritative transmittal for the ALE Member

AIR ID

An alphanumeric value similar to a Payroll ID or a W2 ID, which identifies a customer-defined set of AIR records within one reporting year.

Form 1094-C Build

A code that indicates the current status of Form 1094-C processing for this ACA Information Returns (AIR) cycle.

Valid values are:

Blank - Not created for AIR ID

A - Active, or in the job queue

1 - Completed

ACA Trans Type

Value identifying the type of ACA transmission to the IRS. This transmission type is used at the AIR ID level and at the transmission level.

Valid values are:

- **O**: A transmission containing original Form 1094-C and Form 1095-C records. Original AIR ID and Original Transmission
- **C**: A transmission containing correction Form 1094-C and Form 1095-C records. Correction AIR ID and Correction Transmission
- **R**: A transmission containing replacement Form 1094-C and Form 1095-C records. Replaced Transmission is not applicable to AIR ID

Included in Transmission

When the Form 1094-C records are selected for a transmission build, this column is checked for the included 1094-C records. This field is cleared automatically after the transmission build process.

Submission ID

An internal number assigned by the JD Edwards EnterpriseOne system to a submission.

It uniquely identifies a single submission of 1095-C records to the IRS. This number will also be assigned to the corresponding 1094-C record.

Unique Transmission ID

A unique number identifying a transmission. A Transmission ID is composed of these elements, separated by colons:

- **UUID**: a unique identifier generated by your computer system from the originating system hardware identifier, date and time
- **Application ID**: always "SYS12", identifying the IRS AIR System
- **Transmitter Control Code (TCC)**: the control code you obtain from the IRS for submitting AIR returns
- **Empty Field**: future use
- **Request Type**: always "T" for transaction

IRS Submission Sequence Number

A number assigned to each submission. The IRS Submission Sequence Number always begins with 1 and increments by 1 for each submission within a transmission.

Submission Status

Indicates the current status for a given ACA Form Data submission as communicated by the IRS.

Valid values are:

A: Accepted

R: Rejected

E: Accepted with errors

Aggregated ALE Group Flag

A flag to indicate if the ALE Member is a member of an Aggregated ALE Group.

An Aggregated ALE Group refers to a group of ALE Members treated as a single employer under IRS regulations. If an ALE is made up of only one person or entity, that one ALE Member is not part of an Aggregated ALE Group.

Valid values are:

Blank - The ALE Member is not a member of an Aggregated ALE Group.

X - The ALE Member is a member of an Aggregated ALE Group.

ALE Member ID

A user-defined value to identify the member of a business entity that employs 50 or more full-time equivalent employees (FTEs). Applicable Large Employer Member ID (ALEM) is used with processes relating to the Affordable Care Act (ACA).

ACA Corrected Flag

A flag to indicate if the 1094-C or 1095-C form has been corrected.

Valid values are:

Blank - The form has not been corrected.

X - The form has been corrected.

Auth Transmittal Form Count

The total number of Forms 1095-C filed by or on behalf of the ALE Member.

Certification of Eligibility - A

A flag to indicate whether the Certification of Eligibility - Qualifying Offer Method applies.

Valid values are:

Blank - The Certification of Eligibility - Qualifying Offer Method does not apply.

X - The Certification of Eligibility - Qualifying Offer Method applies.

Certification of Eligibility - B

A flag to indicate whether the Certification of Eligibility - Qualifying Offer Method Transition Relief applies.

Valid values are:

Blank - The Certification of Eligibility - Qualifying Offer Method Transition Relief does not apply.

X - The Certification of Eligibility - Qualifying Offer Method Transition Relief applies.

Certification of Eligibility - C

A flag to indicate whether the Certification of Eligibility - Section 4980H Transition Relief applies.

Valid values are:

Blank - The Certification of Eligibility - Section 4980H Transition Relief does not apply.

X - The Certification of Eligibility - Section 4980H Transition Relief applies.

Certification of Eligibility - D

A flag to indicate whether the Certification of Eligibility - 98% Offer Method applies.

Valid values are:

Blank - The Certification of Eligibility - 98% Offer Method does not apply.

X - The Certification of Eligibility - 98% Offer Method applies.

Government Entity Contact

If applicable, the contact details of the Designated Government Entity (DGE) filing on behalf of the employer/ALE Member.

1095C Forms Count

The total number of Forms 1095-C submitted with this Form 1094-C transmittal.

Date Signed

The date an individual electronically signed the government form.

Note: This field is not used for this tax year.

Government Entity

An Address Book number that identifies the Designated Government Entity (DGE) that is part of or related to the Governmental Unit that is the ALE Member and that is appropriately designated for purposes of the Affordable Care Act Information Returns (AIR) reporting requirements.

Sequence Number

The Sequence Number is zero for original records and increments by one for each correction.

Reporting Company Contact

An Address Book number that identifies the contact for the Reporting Company.

Signature

A field to indicate who is electronically signing the government form.

Note: This field is not used for this tax year.

Contact Title

The format title or position associated with this contact.

Note: This field is not used for this tax year.

Setting Processing Options for Select 1094/1095-Cs for Transmission (P08140)

Use the processing options for P08140 to specify the default processing before selecting Forms 1094-C/1095-C for transmission.

Processing

Prior Year Data Indicator

Use this processing option to indicate whether the transmission is for the current tax year or a prior year.

If you are submitting prior year data, the IRS will validate the XML document against the prior year schema.

Valid values are:

- **0** or Blank - Submitting current year data.
- **1** - Submitting prior year data.

Test File Indicator

Use this processing option to indicate the type of file to be processed.

Once you have received a TCC from the IRS, you must pass a one-time communication test before the IRS places your TCC in production status - T. To pass the communications test, submit a test file using one of the ACA Assurance Test System (AATS) test scenarios to the AIR system. After the file is successfully received, request the IRS to place your TCC in production status.

Valid values are:

- **T** - ACA Assurance Test File
- **P** - Production File

This is a required field.

Transmitter Control Code

Use this processing option to enter the five character code that is assigned by the IRS. This code is required to submit 1094-C and 1095-C data electronically to the IRS.

This is a required field.

Transmitter EIN

Use this processing option to enter the 9-digit Employer Identification Number (EIN) of the transmitter.

This is a required field. If the EIN is not provided, the Form 1094-C will not be processed. If you do not have an EIN, apply for one. More details are available on the IRS website at www.irs.gov/forms.

Note: If there are more than one EIN's in the transmission, then use the transmitter's EIN.

Transmitter Address Number

Use this processing option to enter the Address Book Number of the person, company or service that created and electronically submitted 1094-C and 1095-C data to the IRS.

Transmitter Foreign Entity Indicator

Use this processing option to indicate whether the transmitter is a foreign entity or company.

Valid values are:

- **0** - Not a foreign entity
- **1** - Foreign entity

This is a required field.

Software Vendor Address Number

Use this processing option to enter the ACA software vendor's (Oracle JD Edwards) Address Book Number. Use this value to retrieve first name, last name, and contact phone number.

Software ID

Use this processing option to enter the Software ID assigned to the ACA software when it registered with the IRS. You can only use approved software to perform communication tests.

Note: The Software ID for Oracle JD Edwards EnterpriseOne is assigned by the IRS, and will be supplied with the approved software.

This is a required field and helps to identify if the software is developed in-house or by a vendor.

Please enter the number of employees to be included in each Transmission XML file

Use this processing option to break up the transmission into multiple transmissions, If left blank, a value of 7,500 employees will be used.

Note: According to the IRS, a range of 10,000 to 15,000 employees is equivalent to 100MB worth of data (the maximum size for an Transmission XML file), but this value may vary for customers.

ACA Transmission and Submission Process

The XML Schemas for Form 1094-C or 1095-C include elements designed to uniquely identify ACA Information Returns transmissions, submissions within the transmission, and records within the submission.

Unique Transmission ID

When you submit a transmission containing one or more submissions, the system generates a Unique Transmission ID (UTID). The UTID is a unique number to identify the transmission.

The format of the UTID includes various fields separated by colons (:) as follows:

- **UUID:** a universally unique identifier (UUID) is an identifier standard defined by the Internet Engineering Task Force (IETF) in Request For Comments (RFC) 4122. The UUID consists of a 16-octet (128-bit) number. This is a mandatory field. The UUID is represented by 32 hexadecimal digits, displayed in five groups separated by hyphens.

For example: 550e8400-e29b-41d4-a716-446655440000

- **Application ID:** the Application ID will be SYS12 and is a mandatory field.
- **Transmitter Control Code:** is an alphanumeric field that contains the Transmitter's TCC and is mandatory.
- **Reserved:** is an empty field (no space between colons).
- **Request Type:** the Request Type defines the types of request which must be "T" (Transactional) and is mandatory.

For example, the UTID for a transmission is as follows:550e8400-e29b-41d4-a716-446655440000:SYS12:BB002::T

Creating an ACA Transmission and Submission

After the transmission Form Data XML file and Manifest XML file are built, you transmit the two files to the IRS using the AIR System Web portal. After receiving the files, the IRS will return a Receipt ID. After processing the files, the IRS will return a transmission/submission status. You must record the Receipt ID, Transmission/Submission Status, and Submission Date manually.

Use the Select 1094-C/1095-Cs for Transmission program (P08140) to select records for the build transmission process. The build transmission process will create the necessary ACA Transmission file records (F08211) and ACA Submission file records (F08212).

1. Select one or more Form 1094-C records in the Select 1094/1095-Cs for Transmission form and select Build Transmissions from the Form menu. The system displays the Form 1094-C records included in the transmission.
2. To review or edit ACA transmission details, select Review Transmissions from the Form menu on the Select 1094/1095-Cs for Transmission form. Then, select the transmission on the Work with ACA Transmissions form and click Select.

You can review and edit the selected ACA transmission details on the Review/Edit ACA Transmission Details form.

3. Select a transmission record in the Work with ACA Transmissions form and select *Submit Form Data XML > Submit* from the Row menu. The transmission records are created in the ACA Transmission (F08211) and ACA Submission (F08212) tables and the R08150 build generates the target Form Data XML file. After the Form Data XML file is built, the Transmission Status is updated to 1 in the Work with ACA Transmissions form.

The Manifest Build (R08151) uses the Form Data file name to calculate the checksum and file byte size of the Form Data XML file. The checksum and file byte size are stored in the Manifest XML file.

4. Now select the transmission record in the Work with ACA Transmissions form and select *Submit Manifest XML > Submit* from the Row menu. The R08151 build generates the target Manifest Data XML file.

Note: You cannot select multiple reporting years for processing. You can only select multiple ALE Members with the same reporting year when creating ACA Transmission (F08211) and ACA Submission (F08212) records.

Working with ACA Transmissions

You use the Work with ACA Transmissions form to review transmissions and record the IRS Receipt ID, Transmission Status, and Submission Date.

You can also use the Work with ACA Transmissions form to request resubmission of a transmission which has been rejected by the IRS (after the error causing the rejection has been fixed).

Access the Work with ACA Transmissions form.

Rpt Year

The calendar year for which the ACA Health Coverage Information Return is being produced.

Unique Transmission ID

A unique number identifying a transmission. A transmission can include multiple submissions (groups of one 1094-C and its associated 1095-Cs), but cannot exceed 100 MB.

Trans Type

Value identifying the type of ACA transmission to the IRS.

Valid values are:

- **O:** A transmission containing original Form 1094-C and Form 1095-C records. Original AIR ID and Original Transmission
- **C:** A transmission containing correction Form 1094-C and Form 1095-C records. Correction AIR ID and Correction Transmission

- **R:** A transmission containing replacement Form 1094-C and Form 1095-C records. Replaced Transmission is not applicable to AIR ID

Transmission Status

A code that indicates the current status of the Healthcare Information Return (HCIR) build process for this data transmission.

Valid values are:

- Blank - Not Executed
- **A** - Active, or in the job queue
- **1** - Completed

IRS Transmission Status

Indicates the current status for a given ACA Form Data submission or transmission as communicated by the Internal Revenue Service.

Valid values are:

- **A:** Accepted
- **P:** Partially Accepted (Transmission ONLY)
- **R:** Rejected
- **E:** Accepted with errors

Submission Date

The date on which the transmission was submitted to the Internal Revenue Service (IRS).

Receipt ID

A unique number returned from the IRS to identify the receipt of a transmission (the transmission still may be accepted or rejected). The Receipt ID, Submission ID and Record ID will be concatenated together to identify a 1095-C record on error logs returned from the IRS.

The Receipt ID is an alphanumeric value with three parts separated by hyphens. For example, 1095C-16-00015056. The hyphens are a part of the Receipt ID, so be sure to include them. Note that some desktop cut and paste processes will remove the hyphens.

Transmission 1094-C Form Count

Total number of Form 1094-C records submitted with the transmittal.

Transmission 1095-C Form Count

Total number of Form 1095-C records submitted with the transmittal.

Checksum

The Message-Digest 5 (MD5) checksum value computed on the Form Data File attached to the transmission.

The MD5 checksum is a digital signature of the Form Data XML file. It is calculated so that the receiver can verify whether the digital signature matches their own calculation. If the values match, it's assumed that the complete, unaltered transmission was received.

Attachment Byte Size

The size in bytes of the Form Data File attached to the transmission.

User ID

The code that identifies a user profile.

Transmitter Number

The Address Book Number of the person, company, or service that created and sent the magnetic media tape to the respective governmental agency.

Form Data File Name

The name of the Form Data File attached to the transmission.

The Form Data File naming convention includes the Form Type, a static indicator, the transmitter's TCC, and the date and time the transmitter submits the file.

The naming convention is 1094 <form type>_Request_<TCC>_<Date>T<Time Stamp>Z.xml. For example, *1094C_Request_BY01G_20140101T010102000Z.xml*.

Prior Year Data Indicator

Indicates whether the transmission is for the current year or a prior year.

If you are submitting prior year data, the IRS will validate the XML document against the prior year schema.

Valid values are:

- 0 or Blank - Submitting current year data.
- 1 - Submitting prior year data.

Software Vendor Address Number

The Address Book Number for the ACA software vendor. Use this value to retrieve first name, last name, and contact phone number.

Software ID

The Software ID assigned to the ACA software when it was registered with the IRS. This ID helps to identify if the software is developed in-house or by a vendor. You can only use approved software to perform communication tests.

Transmitter Control Code

The five character code that is assigned to you by the IRS. This code is required to submit 1094-C and 1095-C data electronically to the IRS.

Transmitter EIN

Displays the 9-digit Employer Identification Number (EIN) of the transmitter.

If the EIN is not provided, the Form 1094-C will not be processed. If you do not have an EIN, apply for one. More details are available on the IRS website at www.irs.gov/forms.

Transmitter Foreign Entity Indicator

Indicates whether the transmitter is a foreign entity or company.

Valid values are:

- 0 - Not a foreign entity
- 1 - Foreign entity

Test File Indicator

This value indicates the type of file to be processed.

Use the value "T" when you are submitting your test file for the AIR system communications test. After the communication test, set this value to "P".

Valid values are:

- T - ACA Assurance Test File
- P - Production File

Date Updated

The date that specifies the last update to the file record.

Working with ACA Submissions

When a submission is built, the JD Edwards EnterpriseOne system assigns an internal Submission ID to the submission. This number uniquely identifies a single submission (Form 1095-C records and corresponding Form 1094-C record) to the IRS.

You use the Work with ACA Submissions form to review submissions and if needed record the IRS Submission Status.

- If the submission is in a transmission which was Accepted or Rejected (Status "A" or "R"), the submission status is also the same.
- If the transmission was Partially Accepted or Accepted with Errors (Status "P" or "E") the submission status could be different, and therefore must be entered using this form.

You may also use the Work with ACA Submissions form to resubmit a submission which has been rejected by the IRS (after the error causing the rejection has been fixed).

Access the Work with ACA Submissions form.

Rpt Year

The calendar year for which the ACA Health Coverage Information Return is being produced.

Unique Transmission ID

A unique number identifying a transmission. A transmission can include multiple submissions (groups of one Form 1094-C and its associated Form 1095-Cs), but cannot exceed 100 MB.

IRS Submission Sequence Number

A number assigned to each submission. The IRS Submission Sequence Number always begins with 1 and increments by 1 for each submission within a transmission.

IRS Submission Status

Indicates the current status for a given ACA Form Data submission as communicated by the Internal Revenue Service.

Valid values are:

- **A:** Accepted
- **R:** Rejected
- **E:** Accepted with errors

Submission Date

The date the transmission was submitted to the Internal Revenue Service (IRS).

AIR ID

An alphanumeric value similar to a Payroll ID or a W2 ID, which identifies a customer-defined set of AIR records within one reporting year.

Tax ID

A number that identifies your company to the tax authority. This number can include the tax ID number for an individual, a federal or state corporate tax ID, a sales tax number, and so on.

This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than 9 positions for the tax identification number.

Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.

Receipt ID

A unique number returned from the IRS to identify the receipt of a transmission (the transmission may still be accepted or rejected). The Receipt ID, IRS Submission Sequence Number, and Record ID will be concatenated together to identify a Form 1095-C record on error logs returned from the IRS.

Receipt ID Corrected

Receipt ID of the original transmission that is being replaced.

Authoritative Transmittal Flag

A flag to indicate whether the Form 1094-C is the authoritative transmittal for the ALE Member.

Valid values are:

Blank: Form 1094-C is not the authoritative transmittal for the ALE Member

X: Form 1094-C is the authoritative transmittal for the ALE Member

Authoritative Transmittal Form Count

Total number of Authoritative Form 1094-C records submitted with the transmittal.

Submission ID Corrected

Submission ID of the original Form 1095-C returns that is being replaced.

Setting Processing Option for HCIR Form Data XML (R08150)

Note:

The following three objects should be added before starting with the ACA transmission process for the current year:

- Source UBE and Version - R08150|XJDE00xx
- BI Publisher Report Definition - RD08150xx
- BI Publisher Template - TP08150xx

xx represents the current tax year being processed.

Multiple Manifest XML schemas are not supported as the IRS always uses the current tax year schema for the Manifest XML file, whether reporting for the current tax year or a prior tax year.

Processing

Test Scenario ID

Use this processing option to indicate which predefined test scenario is being submitted to the IRS for review and acceptance. Test Scenario ID is only needed when you are filing the one-time communication test to activate your Transmitter Control Code (TCC) for production.

Test scenarios are defined by the IRS and are based on the your role and are closely aligned with your business model. IRS provides a test environment and test scenarios to assess your filing readiness.

Use Non-Employee Date of Birth

Use this processing option to specify the code to indicate whether the HCIR Form Data XML (R08150) should by default use the date of birth of non-employee covered individuals instead of the Social Security Number (SSN). This default option applies only when both the fields (Date of Birth and SSN) are populated.

Valid values are:

- 0 or Blank - The system uses the SSN for non-employee covered individuals.
- 1 - The system uses the date of birth for non-employee covered individuals.

Setting Processing Option for HCIR Manifest XML (R08151)

Processing

Form Data File Name Override

Use this processing option to indicate the path and file name of the HCIR Form Data XML file (R08150) BI Publisher target XML file.

If left blank, the path is obtained from the Report Definition Archive Paths (P95641) and the file name is obtained from the Update Report Definition - Bursting and Delivery/Override Output (P95620/W95620J). The HCIR Manifest XML (R08151) file requires this path and file name to calculate the checksum and file byte size.

Note: See *Setting Up Report Definitions*.

Resetting Transmission Status of a Transmission

To rerun the Form Data XML file, reset the transmission status of a transmission. Select the transmission record in the Work with ACA Transmissions form and choose Reset Trans Status from the Row menu. The Transmission status is reset from 1 to blank.

Setting Up Report Definitions

The following three setups are mandatory to facilitate transmission of XML files to the IRS.

- **BI Publisher Report Definitions Burst/Delivery (P95620)** - Setup to change the HCIR Form Data XML (RD0815016) file name from the BI Publisher default naming convention to the IRS preferred naming convention.
- **BI Publisher Report Definitions Burst/Delivery (P95620)** - Setup to change the HCIR Manifest XML (RD08151) file name from the BI Publisher default naming convention to the IRS preferred naming convention.
- **Work With Report Definition Archive Paths (P95641)** - Setup for the Manifest XML file generation UBE (R08151) to access the Form Data XML file and calculate the checksum and file byte size. This setup defines a server and path to store the Form Data XML file.

Note:

The following three objects should be added before starting with the ACA transmission process for the current year:

- Source UBE and Version - R08150|XJDE00xx
- BI Publisher Report Definition - RD08150xx
- BI Publisher Template - TP08150xx

xx represents the current tax year being processed.

Multiple Manifest XML schemas are not supported as the IRS always uses the current tax year schema for the Manifest XML file, whether reporting for the current tax year or a prior tax year.

Changing the Form Data XML (RD0815016) File Name

Access the Add Report Definition form from the BI Publisher Report Definitions form (P95620).

1. On the Add Report Definition form, enter the following:

Field	Value
Report Definition	<i>RD0815016</i>
Description	<i>HCIR Form Data XML</i>
Product Code	<i>08</i>
Product System Code	<i>08</i>
Source UBE	<i>R08150</i>
Source Version	<i>XJDE0016</i>
Template Name	<i>TP0815016</i>
Transformation Name	Leave this field blank.

2. Click Next.

3. On the Add Report Definition - Languages and Output Types form, select the following options:
 - o XML in Output Types - Available
 - o XML in Output Types - Default
 - o User Preference Language in Default Languages section
4. Set Object Language to EN.
5. Click Next.
6. On the Add Report Definition - Bursting and Delivery form, select the Override Output File Name tab.
7. Select the Override Output File Name check box.
8. Enter 150ACA in the Data Item for Output File Name field and tab out. The Define File Name button is enabled.
9. Click Define File Name. The Output Structure Definition Value Revisions form is displayed.
10. Verify the following values:

Field	Value
Display Sequence	0
Data Item Alias	DFDN
Structure Member Name	szFormDataFileName

11. Enter /Form_Data_File_Name_ID1 in the Structure Member Value field.
12. Click OK and exit.

Changing the HCIR Manifest XML (RD08151) File Name

Access the Add Report Definition form from the BI Publisher Report Definitions form (P95620).

1. On the Add Report Definition form, enter the following:

Field	Value
Report Definition	RD08151
Description	HCIR Manifest XML
Product Code	08
Product System Code	08
Source UBE	R08151
Source Version	XJDE0001

Field	Value
Template Name	<i>TP08151</i>
Transformation Name	Leave this field blank.

2. Click Next.
3. On the Add Report Definition - Languages and Output Types form, select the following options:
 - o XML in Output Types - Available
 - o XML in Output Types - Default
 - o User Preference Language in Default Languages section
4. Set Object Language to EN.
5. Click Next.
6. On the Add Report Definition - Bursting and Delivery form, select the Override Output File Name tab.
7. Select the Override Output File Name check box.
8. Enter *151ACA* in the Data Item for Output File Name field and tab out. The Define File Name button is enabled.
9. Click Define File Name. The Output Structure Definition Value Revisions form is displayed.
10. Verify the following values:

Field	Value
Display Sequence	<i>0</i>
Data Item Alias	<i>DFDN</i>
Structure Member Name	<i>szManifestFileName</i>

11. Enter */File_Name_For_BIP_ID47* in the Structure Member Value field.
12. Click OK and exit.

Setting the Report Definition Archive Path

1. Access the Work With Report Definition Archive Paths form (P95641) and click Add.
2. On the Report Definition Archive Paths form, enter the following:

Field	Value
Report Definition	<i>RD0815016</i>
Server Name	Enter the name of your enterprise server used to store report output.
User/Role	Enter the name of the user class or group, that can write to the enterprise server.

Field	Value
Path	Enter the path where XML files should be stored.
Object Status	Set the status to <i>Active</i> .

3. Click OK.

Replacing Rejected Transmissions

As a Benefits Administrator, you will have to replace or resubmit all records if your Forms 1094-C and 1095-C transmission is rejected by the IRS.

This section explains the process of replacing a rejected transmission or submission.

Understanding Replacement Transmission

Transmitters can replace rejected transmissions and rejected submissions. When you resubmit for replacing the rejected electronic transmission of your Forms 1094-C/1095-C, the transmission build will include all records from the original transmission automatically.

Replacements can only be transmitted for previously rejected Transmissions or Submissions. Content (forms contained within) of the Replacement Transmissions or Submissions must be same as their corresponding rejected Original Transmissions/Submissions that are being replaced.

A transmission can be rejected by the IRS portal or by the AIR program.

Transmission Rejected by the IRS Portal

When a transmission is rejected at the portal, the transmitter will receive an error code that is prefixed with TPE. The corresponding error description message contains information about the errors that were detected.

When a transmission is rejected at the IRS Portal, the transmitter must fix the problem that caused the rejection and should resend the same transmission with no other changes. The only exception is if the transmission is rejected because the message size is too large (the Form Data File exceeds the 100 MB size limitation). In the case where the message size is too large, the transmitter must reduce the number of records in the Form Data File before resending the transmission.

Transmission Rejected by the AIR Program

Replacement transmissions must be filed when a transmission is rejected by the AIR. When the AIR rejects the transmission, the error code returned to the transmitter is prefixed with AIR. Beginning with processing year 2016, the AIR System includes submission level rejections along with Transmission level rejections. None of the records included in a transmission/submission that is rejected are maintained in the IRS data stores. Thus, when a transmission is rejected by the IRS, it must be replaced in its entirety.

Rules to Replace Transmission Records

After you fix the error that caused the rejection, create a replacement transmission by selecting the transmission record in the Work with ACA Transmissions form and then selecting Replace/Resubmit from the Row menu.

The JD Edwards EnterpriseOne system ensures that the replacement transmissions adhere to the following requirements:

- *TransmissionTypeCd* should be R
- *OriginalReceiptId* data element should contain the ReceiptId of the original transmission and must not be empty
- *OriginalUniqueSubmissionId* in the Form Data File should be empty. If not Transmission will be rejected.
- Replacement transmission should not include any additional replacing or new submissions.

Rules to Replace Submission Records

After you fix the error that caused the rejection, create a replacement submission by selecting the submission record in the Work with ACA Submissions form and then selecting Replace/Resubmit from the Row menu.

The JD Edwards EnterpriseOne system ensures that the replacement submissions adhere to the following requirements:

- *TransmissionTypeCd* should be R
- *OriginalReceiptId* data element value should be empty. If not transmission will be rejected.
- *OriginalUniqueSubmissionId* in the Form Data File should not be empty.
- Duplicate replacement Submission(s) included within the same transmission will be rejected.
- Replacement transmission should not include any new original or new submissions.

Correcting Transmitted Forms 1094-C and 1095-C

As a Benefits Administrator, you must generate and submit corrected Forms 1094-C and 1095-C if the previously filed and accepted returns contain any errors reported by the IRS or if there are any erroneous information that you or your employees discover in the submitted and accepted returns.

Understanding Correction Forms

Correction submissions can only be made to previous submissions that were accepted by the IRS. Accepted submissions may have IRS Submission Status "A" - Accepted or "E" - Accepted with Errors.

Before you can make corrections to an accepted submission, you must create a Correction AIR ID. This is required to enable tracking back to the original record.

Correction submissions can be filed for Forms 1094-C and 1095-C.

- If you make corrections to an accepted 1095-C, you will need to reprint the paper Form 1095-C and send it to the employee/recipient. The paper Form 1095-C will have the CORRECTED box marked with an "X".

- When you make a change to an original Form 1094-C/1095-C that has been submitted and accepted by the IRS, the JD Edwards EnterpriseOne system will automatically create new Form 1094-C/1095-C records for the correction.
- When a correction record is generated, the original record for Form 1094-C/1095-C is flagged as Corrected.
- When you select a corrected Authoritative Transmittal 1094-C for transmission, the JD Edwards EnterpriseOne system will build a submission containing only the corrected Form 1094-C. Corrections to Forms 1095-C will have a new transmittal Form 1094-C created in the 1094-C HCIR build.
- You may not select original and corrected records in the same transmission.
- The original record can only be corrected once. If an error is found in the corrected record, the JD Edwards EnterpriseOne system will create a correction to the recently accepted record and not the original record. You can file only one correction for each unique Submission ID or Record ID.
- The correction record will include the complete record and not just the corrected data elements within the corrected record.
- Correction 1094-C records are created with the Original Unique Submission ID, which is the Receipt ID concatenated with the IRS Submission Sequence Number.
- Correction 1095-C records are created with the Original Unique Record ID, which is the Receipt ID concatenated with the IRS Submission Sequence Number and the Record ID.
- When both Forms 1094-C and 1095-C are corrected, you must file two submissions. The corrected Form 1094-C will be built into a separate submission. The corrected Form 1095-Cs will be built into a correction submission with a new transmittal 1094-C.

Correcting a Form 1094-C Record

If you need to make corrections to an accepted Form 1094-C record, you must first create a Correction AIR ID. The JD Edwards EnterpriseOne system does not do this automatically.

To correct a Form 1094-C record, access the record in the Work with Form 1094-C program (P08121) and edit the record. The JD Edwards EnterpriseOne system will recognize that you are making changes to a Form 1094-C that has been accepted by the IRS, and will flag the original record as Corrected. The system then creates a new corrected record with the new values.

Note: Refer to *Creating or Updating Form 1094-C Information*, for more details on creating a Form 1094-C record.

If a correction Form 1094-C record is deleted before submission to the IRS, the JD Edwards EnterpriseOne system automatically clears the CORRECTED flag in the original Form 1094-C record.

Correcting Form 1095-C Records

You can make corrections to accepted Form 1095-C records in two ways.

- Review and edit one or more Form 1095-C records using the Work with Form 1095-C Information program (P08119).
- Run the 1095-C Offer and Coverage Workfile Build - R08119 (from the ACA Information Returns Workbench) for the Correction AIR ID using the same parameters as specified for the original AIR ID.

When a 1095C Offer and Coverage (F08119) record is corrected, the system also generates a corrected record for the corresponding F08120 record in the 1095C Covered Individuals (F08120) table. Similarly, when a F08120 record is corrected, the corresponding F08119 correction record is also created.

After corrections are processed (using the P08119 program or by building the R08119 report), the original records are automatically updated with the Corrected flag, and the corrections are saved into new records using the Corrections AIR ID. The Line ID value on the new records is incremented by 1.

If a correction Form 1095-C record is deleted before submission to the IRS, the JD Edwards EnterpriseOne system automatically clears the CORRECTED flag in the original Form 1095-C record.

After submission, if the status of the submission is A (Accepted) or E (Accepted with Errors) in the F08212 table, the delete button is enabled in the Form 1095-C Part II and Part III form. When you delete a submitted and accepted Form 1095-C record, the system deletes the record but does not create a correction record. To replace the deleted record, create a new Correction record using the Work with Form 1095-C Information program (P08119).

8 Appendix A - Control Tables and Sample Forms

Control Tables

The system uses each of the following tables in AIR processing steps explained in this guide.

F08116 - ACA Applicable Large Employer

This table allows multiple home companies to be grouped together under the same ALE ID effectively creating an Applicable Large Employer (ALE) that is treated as a single employer.

F081161 - ACA Employee Eligibility

This table is used to determine the ACA - Hours of Service Process and Report (P08416).

F081162 - ACA Parameters

This table is used along with the F081161 table to determine the ACA - Hours of Service Process and Report (P08416).

F08117 - Employee Offer and Coverage Setup

This table provides default information for ACA Form 1095-C lines 14, 15 and 16.

F08118 - Periods Of Employment

This table is used to determine gaps in employment.

F08119 - 1095C Offer and Coverage

This table contains the information that is used to produce the Form 1095-C for an ALE Member, Employee, or Reporting Year.

F08120 - 1095C Covered Individuals

This table contains information for Part III of Form 1095-C (Covered Individuals).

F08124 - Hours Worked By Month

This table accumulates the hours an employee worked during each month of the reporting year.

F08210 - AIR Cycle Parameters File

This table contains the control parameters for information common to each AIR ID.

F08121 - 1094 C ALE Member Information

This table contains information for Part I and Part II of Form 1094-C.

F08122 - 1094C ALE Member Information - Monthly

This table contains information for Part III of Form 1094-C.

F08123 - 1094C Other Aggregated ALE Group Members

This table contains information for Part IV of Form 1094-C.

F08211 - ACA Transmission

This table contains information for transmission of ACA Returns.

F08212 - ACA Submission

This table contains information related to a single ACA submission.

Sample Forms

These forms are provided for informational purposes only. Do not reproduce these forms for filing.

Employer-Provided Health Insurance Offer and Coverage (1095-C) Form

This is a sample of Form 1095-C:

600120

Form **1095-C**
 Department of the Treasury
 Internal Revenue Service

Employer-Provided Health Insurance Offer and Coverage
 Do not attach to your tax return. Keep for your records.
 Go to www.irs.gov/Form1095C for instructions and the latest information.

VOID
 CORRECTED

OMB No. 1545-2251
2024

Part I Employee				Applicable Large Employer Member (Employer)												
1 Name of employee (first name, middle initial, last name)		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		6 Country and ZIP or foreign postal code		11 City or town		12 State or province			13 Country and ZIP or foreign postal code					
Part II Employee Offer of Coverage		Employee's Age on January 1							Plan Start Month (enter 2-digit number):							
	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec			
14 Offer of Coverage (enter required code)																
15 Employee Required Contribution (see instructions)	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$			
16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)																
17 ZIP Code																

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 60705M Form 1095-C (2024)

Form 1095-C (2024)

600320
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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				<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				<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				<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"/>
21				<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"/>
22				<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"/>
23				<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"/>
24				<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"/>
25				<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"/>
26				<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"/>
27				<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"/>
28				<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"/>
29				<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"/>
30				<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"/>

Form 1095-C (2024)

Sample Form Data XML

```

▼<ns0:Form109495CTransmittalUpstream xmlns:ns0="urn:us:gov:treasury:irs:msg:form1094-1095Ctransmitterupstreammessage">
  ▼<airty24:Form1094CUpstreamDetail xmlns:airty24="urn:us:gov:treasury:irs:ext:aca:air:ty24" recordType="" lineNum="0">
    <airty24:SubmissionId>1</airty24:SubmissionId>
    <airty24:TaxYr>2024</airty24:TaxYr>
    <airty24:CorrectedInd>0</airty24:CorrectedInd>
    ▼<airty24:EmployerInformationGrp>
      ▼<airty24:BusinessName>
        <airty24:BusinessNameLine1Txt>Financial Distribution Company</airty24:BusinessNameLine1Txt>
      </airty24:BusinessName>
      <airty24:BusinessNameControlTxt>FINA</airty24:BusinessNameControlTxt>
      <irs:TINRequestTypeCd xmlns:irs="urn:us:gov:treasury:irs:common">BUSINESS_TIN</irs:TINRequestTypeCd>
      <irs:EmployerEIN xmlns:irs="urn:us:gov:treasury:irs:common">840782700</irs:EmployerEIN>
    </airty24:EmployerInformationGrp>
    ▼<airty24:MailingAddressGrp>
      ▼<airty24:USAddressGrp>
        <airty24:AddressLine1Txt>Technology Way</airty24:AddressLine1Txt>
        <airty24:AddressLine2Txt>Address line 2</airty24:AddressLine2Txt>
        <irs:CityNm xmlns:irs="urn:us:gov:treasury:irs:common">Seattle</irs:CityNm>
        <airty24:USStateCd>CO</airty24:USStateCd>
        <irs:USZIPCd xmlns:irs="urn:us:gov:treasury:irs:common">80921</irs:USZIPCd>
      </airty24:USAddressGrp>
    </airty24:MailingAddressGrp>
    <airty24:ContactNameGrp/>
    <airty24:ContactPhoneNum>08055555555</airty24:ContactPhoneNum>
  </airty24:Form1094CUpstreamDetail>
  <airty24:Form1095CAttachedCnt>4</airty24:Form1095CAttachedCnt>
  <airty24:AuthoritativeTransmittalInd>1</airty24:AuthoritativeTransmittalInd>
  <airty24:TotalForm1095CALEMemberCnt>4</airty24:TotalForm1095CALEMemberCnt>
  <airty24:AggregatedGroupMemberCd>2</airty24:AggregatedGroupMemberCd>
    
```

Sample Manifest Data XML

```

▼<ns0:ACAUIBusinessHeader xmlns:ns0="urn:us:gov:treasury:irs:msg:acauibusinessheader">
  ▼<acabushdr:ACABusinessHeader xmlns:acabushdr="urn:us:gov:treasury:irs:msg:acabusinessheader">
    <airty24:UniqueTransmissionId xmlns:airty24="urn:us:gov:treasury:irs:ext:aca:air:ty24">9F67C7C0-9BE8-11EF
    <irs:Timestamp xmlns:irs="urn:us:gov:treasury:irs:common">2024-11-06T07:13:46Z</irs:Timestamp>
  </acabushdr:ACABusinessHeader>
  ▼<airty24:ACATransmitterManifestReqDtl xmlns:airty24="urn:us:gov:treasury:irs:ext:aca:air:ty24">
    <airty24:PaymentYr>2024</airty24:PaymentYr>
    <airty24:PriorYearDataInd>1</airty24:PriorYearDataInd>
    <irs:EIN xmlns:irs="urn:us:gov:treasury:irs:common">192830091</irs:EIN>
    <airty24:TransmissionTypeCd>0</airty24:TransmissionTypeCd>
    <airty24:TestFileCd>P</airty24:TestFileCd>
    <airty24:TransmitterForeignEntityInd>0</airty24:TransmitterForeignEntityInd>
    ▼<airty24:TransmitterNameGrp>
      <airty24:BusinessNameLine1Txt>Bill Abin S</airty24:BusinessNameLine1Txt>
    </airty24:TransmitterNameGrp>
    ▼<airty24:CompanyInformationGrp>
      <airty24:CompanyNm>Bill Abin S</airty24:CompanyNm>
      ▼<airty24:MailingAddressGrp>
        ▼<airty24:USAddressGrp>
          <airty24:AddressLine1Txt>410 17th Avenue</airty24:AddressLine1Txt>
          <irs:CityNm xmlns:irs="urn:us:gov:treasury:irs:common">Denver</irs:CityNm>
          <airty24:USStateCd>CO</airty24:USStateCd>
          <irs:USZIPCd xmlns:irs="urn:us:gov:treasury:irs:common">80237</irs:USZIPCd>
        </airty24:USAddressGrp>
      </airty24:MailingAddressGrp>
      ▼<airty24:ContactNameGrp>
        <airty24:PersonFirstNm>Bill</airty24:PersonFirstNm>
        <airty24:PersonMiddleNm>Abin</airty24:PersonMiddleNm>
        <airty24:PersonLastNm>S</airty24:PersonLastNm>
      </airty24:ContactNameGrp>
      <airty24:ContactPhoneNum>4033347272</airty24:ContactPhoneNum>
    </airty24:CompanyInformationGrp>
    ▼<airty24:VendorInformationGrp>
  
```

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