Infor Distribution FACTS
Using ACA 1094/1095 Management (PRE109)

Release levels 7.9 and Later

Important Notices

Trademark Acknowledgements

Publication Information

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About this guide

This guide describes workflow, concepts and procedures for installing and using the Infor Distribution FACTS ACA 1094/1095 Management (PRE109) program in the Payroll module. The resulting data from the processing described in this document may provide the basis to assist you in determining the information needed to complete IRS Health Coverage Report Forms 1094B/C and 1095B/C.

You are solely responsible for all of the information you choose to use to file these or any IRS tax reporting forms.

Intended audience

This guide is for FACTS end users, managers, in-house analysts, and trainers who require an understanding of the product and how to use it.

Related documents

Refer to www.irs.gov for all relevant documents and instructions for filing any IRS form. Among the relevant IRS documents are:

- *Section 6056 Reporting Workbook Instructional Guide*
- *Section 6056 Reporting Workbook*
- *Employer Reporting of Health Coverage—Code Sections 6055 & 6056 Health Care Reform Legislative Brief*
- *i109495b.pdf and i109495c.pdf*

Contacting Infor

If you have questions about Infor products, go to the Infor Support Portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Overview

The Affordable Care Act has generated new filing requirements under Internal Revenue Code Section 6056. Some employers are required to file Forms 1094B and 1095B, and some employers are required to file Forms 1094C and 1095C for 2015. It is solely your responsibility to know whether you are required to file and which forms you must file.

If you are required to file these forms and your filing needs are covered by the ACA 1094/5 Management (PRE109) program, this solution and associated Microsoft® Excel spreadsheets are available for you to enter employees' dependents and retrieve FACTS-based data that may assist you in completing these forms.

The FACTS programs and processes referenced in this guide cannot determine or indicate what forms must be filed or the information for those forms. Tax data and filing decisions are the sole responsibility of the user.

Important processing notes

FACTS does not support processing for Designated Government Entity (Part 1, Item 9).

FACTS does not support Aggregated Applicable Large Employer (ALE) Group (Part II, Item 21) or Other ALE Members of Aggregated ALE Group (Part IV).

FACTS does not support electronic filing of forms 1094/5.

Installing ACA 1094/5 Management (PRE109)

The ACA 1094/5 Management (PRE109) solution was introduced in the version 9.0 patch. All of the content of this patch is included in FACTS 9.0.1 and later releases.

9.0 Patch

The FACTS 9.0 patch for ACA 1094/5 reporting is being made available to be delivered *only* to customers currently on maintenance.

We are also separately providing a patch for FACTS 7.0. For customer's current on maintenance on FACTS 7.1 through 7.9, it is your discretion whether it is best to use the 9.0 patch and move it back or to use the 7.0 patch and move it forward. A point to consider is whether the ODBC aliases for the payroll files match the 9.0 aliases or the 7.0 aliases.

There are no changes to existing programs, and all of the files impacted are new to this patch. Furthermore, the coding approach minimized the amount and variety of metadata. No existing metadata records were changed – all metadata included in SMFLUP are new records.

FACTS 9.0 Patch contents

The release level 9.0 patch contains these files.

data/PR/PR109D.NEW

data/PR/PR1094.NEW

data/PR/PR1095.NEW

data/PR/PRDPND.NEW

meta/SM/SMFLUP

prog/PR/PRE109

Installation

Complete these steps to install the patch.

1 Extract the contents of the ZIP file into the main FACTS directory.

2 Rename the 4 PR files to remove the .NEW extension (this extension is there to prevent the accidental overwriting of existing files).

3 From the Modification Support Menu, select Merge SMFLUP and merge all of the metadata. It is not necessary to rebuild string templates even though you may be prompted to do so.

4 You are now ready to begin processing described in the *Using ACA 1094/5 Management (PRE109)* section of this document.

FACTS 7.0 Patch

The FACTS 7.0 patch for ACA 1094/5 reporting is being made available to be delivered *only* to customers currently on maintenance.

Note: The FACTS 7.0 patch for ACA 1094/5 reporting is only for GUI (graphical) FACTS systems. The patch cannot be installed on CUI (character-based) FACTS systems.

We are also separately providing a patch for FACTS 9.0. For customers' current on maintenance on FACTS 7.1 through 7.9, it is your discretion whether it is best to use the 9.0 patch and move it back or to use the 7.0 patch and move it forward. A point to consider is whether the ODBC aliases for the payroll files match the 9.0 aliases or the 7.0 aliases.

There are no changes to existing programs, and all of the files impacted are new to this patch. Furthermore, the coding approach minimized the amount and variety of metadata. No existing metadata records were changed – all metadata included in SMFLUP are new records.

FACTS 7.0 Patch contents

The release level 7.0 patch contains these files.

data/PR/PR109D.NEW

data/PR/PR1094.NEW

data/PR/PR1095.NEW

data/PR/PRDPND.NEW

data/SM/SMFLUP

prog/PR/PRE109

Installation

Complete these steps to install the patch.

1. Extract the contents of the ZIP file into the main FACTS directory.
2. Rename the 4 PR files to remove the .NEW extension (this extension is there to prevent the accidental overwriting of existing files).
3. From the Modification Support Menu, select Update Files from SMFLUP and merge all of the metadata. It is not necessary to rebuild string templates even though you may be prompted to do so.
4. Add PRE109 – ACA 1094/5 Management to Program F/M
5. Add PRE109 to the PRS810 – Payroll End of Year menu using Menu F/M
6. You are now ready to begin processing described in the *Using ACA 1094/5 Management (PRE109)* section of this document.

Using ACA 1094/5 Management (PRE109)

Work flow

The ACA 1094/5 Management (PRE109) program allows you to add employee dependents, specify supported form data, and in conjunction with Excel spreadsheets, export employee/dependents information, review, modify and add additional values to complete the forms, re-import the spreadsheet, and then print forms 1095 and 1094 as you determine necessary. Once the forms are printed the screen is locked so that information cannot be over-written without using the Release to change and reprint option.

The menu options laid out at the top of the screen are primarily organized to be accessed from left to right for steps in processing.

Process overview

The Process overview table provides a brief summary of the ACA 1094/5 Management process. Refer to screen details and tasks for step-by-step instructions.

Menu (if any)	**Task**	**Screen**
Options	Enter Dependents	Employee Dependents (PRE109.D)
N/A	Enter Reporting Year and Specify 1094/1095 tax options	ACA 1094/5 Management (PRE109)
Options	Get Employee Data	Deduction Codes dialog box (Specify type of history to use and deduction code for employee share default.) ACA 1094/5 Management (PRE109) (populates browser information)

Menu (if any)	Task	Screen
Dependent Data	Export to Excel	Employee Dependent Information form 1095 Excel spreadsheet
Dependent Data	Import from Excel	ACA 1094/5 Management (PRE109) (populates behind-the-screen data tables)
Employee Data	Export to Excel	Employee Information form 1095 Excel spreadsheet
Employee Data	Import from Excel	ACA 1094/5 Management (PRE109) (populates behind-the-screen data tables)
Options	Update Employee Count (optional update process)	ACA 1094/5 Management (PRE109) (Uses the Employee Information imported from form 1095 Excel spreadsheet to populate these fields: # Full Time, Tot # Empl.)
Print	1095s	Print 1095 Forms
Print	1094s	Print 1094 Forms

Screens, menus and spreadsheets

ACA 1094/5 Management (PRE109)

The ACA 1094/5 Management (PRE109) program is located in the Payroll module. The complete path is Payroll>End of Period>End of Year Processing>ACA 1094/5 Management. After you access this program, use the menu options described in this section and follow the steps needed to complete and print 1094/1095 forms.

Processing details

Employee Dependents (PRE109.D)

The first task is to enter relevant dependent information for each employee. The Employee Dependents (PRE109.D) screen is available from the Options menu for this process. Once dependents are entered, this information is retained for year-to-year use and can be modified at any time.

Note: Dependent information entered here is not specific to a reporting year – a dependent may be covered one year and not in subsequent years. The information relevant to each reporting year is handled via the “Dependent Data” menu options.

1094 Tax options

The next task involves completing the 1094 tax options on ACA 1094/5 Management. Follow all applicable IRS instructions to complete the 1094 information for the selected reporting year. It is the sole responsibility of the user to determine which forms, if any, should be printed and the tax information for those forms.

Enter the tax filing year. The check boxes **Authorized Transmittal**, **Qualifying Offer Method**, **98% Offer Method** (Note: If you select this check box, the **# Full Time** prompts are disabled.), **Qualifying Offer Transition Relief**, and **Section 4980H Transition Relief** (Note: If you do not select this check box, the 4980H Code prompts are disabled.) represent the information on Form 1094. Check the boxes as you determine for your company’s filing situation.

Enter the contact name and phone number to report on the 1094/1095 forms, and indicate which form to use: Forms B or Forms C. If you select to use forms B, the **Origin** field is enabled for you to specify the appropriate origin of policy code.

Enter the Min Coverage, # Full Time, Tot # Empl, and 4980H Code fields for either “All 12” months or individually for Jan – Dec, per IRS regulations.

After entering through all of the fields, the remaining menu options will enable, allowing you to proceed to the next tasks.

Retrieving employee data

The next task, **Get Employee Data**, is the second task on the Options menu. This task retrieves selected employee base data for the filing year. When you click **Options>Get Employee Data**, the Deduction Codes dialog box is displayed where you can specify the type of **History to Use** to compile the data needed to complete the forms and **Deduction Codes** to use for defaulting the employee share initial values.

Choosing which history to use

You can use employee period history or check history from Payroll as a basis for your 1095 and 1094 form data.

Note: If in running the Clear Check History (PRU810) program, you have purged any of the corresponding check history for the filing year, using check history will result in incomplete starting data.

Note: If the **# of History Period Stored** field in the PR Static Control (PRF980) program is insufficient to ensure that all of the periods in the filing year remain on file, using period history will result in incomplete starting data.

Whether selecting Check History or Period History, the actual data stored in FACTS is only a "starting point" for your calculations. The IRS is requesting information for specific months, and the FACTS check history and period history may or may not align with the months as the IRS requires.

With check history, we use the check data, and attribute all of the hours, earnings and deductions to that month. With period history, we attempt to determine which month the period covers and attribute all of the hours, earnings and deductions to that month.

As a result, once the data is captured, it is your responsibility to update the data as necessary to ensure it aligns properly with appropriate IRS regulations.

After you specify the history type, enter the payroll deduction codes for defaulting the employee's share. Use a space or comma to separate multiple deduction codes.

The IRS requests the "Employee Share of Lowest Cost Monthly Premium for Self-Only Minimum Value Coverage". This value is defined by the IRS, and it is your responsibility to understand what it means and how to calculate it.

As an attempt to help provide you information that may be relevant to this calculation, FACTS will capture the amount withheld from the employees' checks for the selected deduction codes. It is all but certain that this number is NOT the value the IRS requires, and it is solely your responsibility to determine what that value is.

Additionally, FACTS will calculate for you the # hours and the earnings per "month" (as defined above based on which history you chose to use). These values will be exported to the Employee Data spreadsheet.

When you complete the information in the Deduction Codes dialog box and click **OK**, employees for the tax year are displayed in the browser of ACA 1094/5 Management. In addition to the employee name and number, three columns of information are also displayed. It is important that you understand what this information represents and how it was derived from FACTS.

Browser column	Details
FT	Full Time: As described above when selecting the type of history to use, FACTS allocates the reported hours per months and attempts to identify which employees were full time each month. If an employee works 130hrs or more in a month, this indicator is set to FT=Y. The IRS has multiple ways of determining which employees are considered "full time", so the user is solely responsible for verifying each employee's time and whether the employee is full time.
Incl	This setting indicates whether a Form-1095 should be printed for this employee.

Prtd	Indicates whether a Form-1095 has been printed for this employee.

The information gathered in this step is made available to be edited in the tasks described below.

Managing employee dependent data

The next task is to update the filing year dependent data. This task should be completed before editing the employee data.

Exporting and importing of the filing year dependent data are both **required** tasks.

On the **Dependent Data** menu, the **Export to Excel** task is used to open the filing year's dependent information. For the reporting year specified, the spreadsheet displays the employee name and number, and each dependent id, name, date of birth and age. These fields should NOT be changed – they are here for information purposes only. If any of these fields are incorrect or if any dependents are missing, they must be corrected or entered in the Options/Enter Dependents menu option.

The remaining fields, **Covered in all 12 months**, **Covered in January** to **December** are available for you to complete for each dependent. Enter a capital letter N or a capital letter Y in each of these cells for each dependent.

You must complete all of the spreadsheet fields before the import regardless of which form type (B or C) you expect to use. Once you are satisfied with your entries Employee Dependent Information form 1095 Excel spreadsheet, have the completed spreadsheet open and active and click **Dependent Data>Import from Excel** on ACA 1094/5 Management (PRE109). This process brings the dependent data information you reviewed and modified for form 1095 into FACTS to be prepared to print on the forms.

Once the import is complete, you can close and delete the spreadsheet. If additional edits need to be completed later, you can simply click "**Dependent Data>Export to Excel**" and the spreadsheet will be recreated with the previously-imported values.

Managing employee data

After the dependent data has been imported, the next step is to update the employee data. Click **Employee Data>Export to Excel** to send the employee information to the Employee Information for 1095 spreadsheet. (Ensure Excel is already open to a blank workbook.) For the reporting year specified, the spreadsheet is populated with all of the current information for each potential employee. Some of the data is for reference only, including: Employee #, name, hire date, termination date, rehire date, pay change date, employee class, department, branch, active flag and number of dependents. None of these fields should be changed on the spreadsheet.

This information on the spreadsheet should be updated/entered.

Employee counts as full time – This must be either a capital letter Y or a capital letter N.

Print 1095 for this employee – This must be either a capital letter Y or a capital letter N.

Offer of Coverage Codes – Enter the appropriate codes based on the IRS instructions for form 1095. These fields (all 12 months AND each month) must be entered for all employees regardless of which form (B/C) you will be using, and the entered values must conform exactly to the IRS approved values.

Employee Share – These fields may be defaulted based on the deduction code(s) you entered above. You must determine what the proper values are for these fields and enter them accordingly. Most of the data on this spreadsheet is put there to potentially aid you in determining the final answer for the Employee Share fields.

Section 4980H Codes – Enter the appropriate codes based on the IRS instructions for form 1095. If your company does not qualify for Section 4980H Transition Relief, leave all of these fields blank.

Additionally, the “Hours in” fields are used to aid you in determining who is or is not considered a full time employee. You can update these fields if they are of value to you. If you choose NOT to update these fields, do not use the “**Options>Update Employee Count**” menu option, as it utilizes this information.

The “Earnings in” field is strictly for informational purposes to aid you in updating the other fields on this spreadsheet. These fields can be ignored or updated in any way that is useful to you. The only requirement is that the values in them either be blank or valid numbers.

You must complete all of the spreadsheet fields before the import, regardless of which form type (B or C) you selected to use. Once you are satisfied with your entries in the Employee Information for 1095 Excel spreadsheet, have the spreadsheet open and active and click **Employee Data>Import from Excel** on ACA 1094/5 Management (PRE109). This process brings the employee information from the spreadsheet into FACTS to be prepared to print on the forms. After the import, note the values in the **FT** and **Incl** columns of the browser now reflect your Employee Information for 1095 spreadsheet changes.

If there were any import failure messages, correct the data on the spreadsheet and select the Import again, until it completes without failure. Once the import is complete, you can close the spreadsheet and delete it. If changes are needed, you simply export the data again.

Employee count information

The **Options> Update Employee Count** menu option is used to look at the imported Employee Data and count the number of employees and full time employees for you. Only use this option if you updated the “Hours in” columns for all employees on the Employee Information for 1095 Excel spreadsheet.

When you click **Options>Update Employee Count**, processing occurs to collect values and total the hours information in the spreadsheet. The results are displayed in these fields: **# Full Time**, **Tot # Empl** for **All 12 months** or **January** to **December** and are used for creating Form-1095s.

Alternatively, you can also enter this information directly into ACA 1094/5 Management (PRE109) after you import employee information from Excel.

Making changes before printing

Before printing the forms, you can repeat this process of exporting information to Excel, modifying it and importing it again. If you click **Options>Get Employee Data** again, the system displays a message asking if you want to overwrite existing 1095 information. If you answer **Yes**, all of your changes will be overwritten with the starting employee data. Answering **No** will add employee information that had not already been entered.

Printing Forms 1094/5

The last step in the process is printing Form-1095 and Form-1094 for the tax year.

It is important to note that FACTS ACA 1094/5 Management does not support electronic filing.

Prior to printing, verify that the “Form To Use” option is set to the correct form (B or C) your company is required to file.

Printing specifications

- FACTS processing uses these pre–printed, laser printer forms from Transform Technologies.
  - Form 1094B – Transform form # B1094B (no envelope)
  - Form 1095B – Transform form # B95BFPREC, envelope # 95DWENV05
  - Form 1094C – Transform form #s B1094C1, B1094C2, B1094C3 (no envelope)
  - Form 1095C – Transform form # B1095C and optionally form B1095CCON (for employees with more than 6 dependents), envelope # 95DWENV05
- The 1094 forms require landscape format printing.
- The 1095 forms require landscape format printing.
- Both form types require 10 CPI (centimeters per inch) and 6 LPI (lines per inch).

Forms 1095 must be printed first. Click **Print>1095s** to access Print 1095 Forms (PRE109) dialog box for the first set of forms (based on the **Form to Use** selection). Select the printer and indicate whether to print one form (to verify the forms are properly loaded in the printer, for example) or to print all forms now. Click **OK**.

When the Form-1095 B or C print process is complete, the **Num 1095s Printed** field is automatically populated with the number of 1095 forms that were created.

It is suggested that you review the Form-1095 printouts before continuing.

To print Form-1094 form(s), click **Print>1094**, specify the printer to use and click **OK**.

When the Form-1094 print process is complete, the **Form 1094 Printed** check box is checked automatically and all of the options (except Export to Excel functions for reviewing information) on the screen are disabled so no further editing can be done. This is to help prevent you from updating information and failing to reprint the forms.

Making changes after printing

If you discover an error or omission after printing the 1094/5 forms, you can enable the screen for processing. To make changes after printing, click **Options>Release to change and reprint**. This unlocks the ACA 1094/5 Management (PRE109) screen and menu options for reprocessing.

Tasks

Adding employee dependents

1 Click **Payroll>End of Period>End of Year Processing>ACA 1094/5 Management (PRE109)**.

2 Click **Options>Enter Dependents**.

3 The Employee Dependents (PRE109.D) screen is displayed.

4 Specify an employee code.

5 Click **Add** and specify the dependent’s name, social security number and date of birth.

6 (Optional) Repeat step 3 for each dependent for this employee.

7 Click **Done**.

8 (Optional) Repeat step 1-4 to enter dependents for each employee.

9 Click **Done** to return to ACA 1094/5 Management.

Specifying 1094 tax options

1 (Optional) If you exited the program after entering dependents, **click Payroll>End of Period>End of Year Processing>ACA 1094/5 Management (PRE109)**.

2 Specify the tax filing year.

3 For each of these check boxes: **Authorized Transmittal**, **Qualifying Offer Method**, **98% Offer Method**, **Qualifying Offer Transition Relief**, and **Section 4980H Transition Relief** check the boxes as you determine for your company’s filing situation.

4 In the **Contact** and **Phone** fields, specify the contact name and phone number to report on the 1094/1095 forms.

5 At the **Form To Use** drop-down list, indicate which 1094/1095 forms to print: **B** or **C**.

6 If you selected to use Form B, you must specify the origin of policy code in the **Origin** field. Otherwise, this field is disabled.

7 Refer to the next task: *Getting employee data* for step-by-step instructions.

Getting employee data (one time only)

1. On ACA 1094/5 Management (PRE109), click **Options>Get Employee Data.**
2. The Deduction Codes dialog box is displayed.
3. For **History to Use**, specify **P-Period History** or **C-Check History** to use to compile the data needed to complete the forms
4. Specify the **Deduction Codes** to use for defaulting the employee share initial values.
5. Click **OK**.
6. Employees for the tax year are displayed in the browser of ACA 1094/5 Management.
7. Refer to the next task: *Entering/Updating filing year dependent data* for step-by-step instructions.

Entering/Updating filing year dependent data

1. On ACA 1094/5 Management (PRE109), click **Dependent Data >Export to Excel**. (Be sure Excel is open to a blank workbook.)
2. For the reporting year specified, the spreadsheet displays the employee name and number, and each dependent id, name, date of birth and age.
3. Review, validate and modify this information as needed.
4. Complete the remaining fields, **Covered in all 12 months**, **Covered in January to Covered in December** for each dependent.
5. Review, validate and modify your entries on Employee Dependent Information form 1095 Excel spreadsheet.
6. Click **Dependent Data>Import from Excel** on ACA 1094/5 Management (PRE109). (Be sure the spreadsheet is open in Excel.) This process brings the dependent data information you reviewed and modified for form 1095 into FACTS to be prepared to print on the forms.
7. Refer to the next task: *Entering/Updating filing year employee data* for step-by-step instructions.

Entering/Updating filing year employee data

1. On ACA 1094/5 Management (PRE109), click **Employee Data >Export to Excel**. (Be sure Excel is open to a blank workbook.)
2. For the reporting year specified, the spreadsheet is populated with the employee name and number, and this information: **Employee counts as full time**, **Print 1095 for this employee, 1095 has been printed Y/N** (this field is display-only), and **Number of dependents**.
3. In the **Offer of Coverage Code all 12 months**, **Offer of Coverage Code January to December** fields, specify the required information for each employee.

4 In the **Employee share all 12 months**, **Employee share January to December** and the **Section 4980H 12mths**, and **Section 4980H January to December** fields, estimates are displayed, based on values from the employees' checks and additional FACTS data.

5 <u>You must review the information in steps 2-4 and revise it for correctness and accuracy</u>.
Note: This information is merely an estimate. It is the sole responsibility of the user to determine the actual tax form values.

6 The employees' hours and earning by month are displayed in the remaining fields. These numbers are estimates provided to assist you in determining the full time or part time status for the employee and the values for the employee share.

7 Review, validate and modify your entries on Employee Information for 1095 Excel spreadsheet.

8 Click **Employee Data>Import from Excel** on ACA 1094/5 Management (PRE109). (Be sure the spreadsheet is open in Excel.) This process brings the employee data you reviewed and modified for form 1095 into FACTS to be prepared to print on the forms.

9 Refer to the next task: *Updating employee count information* for step-by-step instructions.

Updating employee count information

After you have imported employee data, you have two methods of completing the remaining header fields on ACA 1094/5 Management (PRE109).

Option 1

1 Click **Options>Update Employee Count**. Note this step must be completed *after* importing employee data, and only if you validated and updated the "Hours in" fields for each employee.

2 Click **OK** when the system displays the Get Employee Count message.

3 The results are displayed in these fields: **# Full Time**, **Tot # Empl** for **All 12 months** or **January** to **December** used for creating Form-1095s.

4 <u>You must review the information and revise it for correctness and accuracy</u>.
Note: It is the sole responsibility of the user to determine the actual tax form values.

Option 2

1 After importing employee data, complete this information as you determine necessary. Note: It is the sole responsibility of the user to determine the actual tax form values.

2 For **Min Coverage**, check the **All 12** check box or check the applicable month, **January** to **December** check boxes where minimum coverage was offered.

3 For **# Full Time**, specify the number of full time employees for all 12 months if it was the same or specify the number of full time employees in each month, **January** to **December**.

4 For **Tot # Empl**, specify the total number of employees for all 12 months if it was the same or specify the total number of employees in each month, **January** to **December**.

5 For **4980HCode**, specify the 4980H transition relief code for all 12 months if it was the same or specify the code for each month, **January** to **December**.

6 Refer to the next task: *Printing 1095 forms* for step-by-step instructions.

Printing 1095 forms

(Print Form-1095 first.)

1 On ACA 1094/5 Management (PRE109), click **Print>1095s**.

2 Specify the printer to use.

3 Indicate whether to print **A-All Forms** or **1-One Form** (for an alignment).

4 Click **OK**.

5 When the Form-1095 B or C print process is complete, the **Num 1095s Printed** field is automatically populated with the number of 1095 forms that were created.

6 It is recommended that you review the 1095 forms before printing Form-1094.

7 Refer to the next task: *Printing 1094 forms* for step-by-step instructions.

Printing 1094 forms

1 On ACA 1094/5 Management (PRE109), click **Print>1094s**.

2 Specify the printer to use.

3 Click **OK**.

4 When the Form-1095 B or C print process is complete, the **Form 1094 Printed** check box is checked automatically and all of the options on the screen are disabled so no further editing can be done.

Troubleshooting

The Troubleshooting section contains step-by-step instructions for overwriting existing 1094 and 1095 forms information before and after printing the Form-1095s and Form-1094s, as well as how to remove current year dependent data.

Changing employee data before printing

Base employee data like Name, Social Security number, etc. are taken directly from Employee F/M and should be updated there. All other employee data is maintained and updated on the Employee Data spreadsheet per above instructions.

The **Options>Get Employee Data** menu option should only be used when you want to throw away all of the data currently on the Employee Data spreadsheet and start over – for example, if you used Period History and decided to try Check History instead; or if you specified the incorrect deductions code.

Changing employee dependent data before printing

Base dependent data including Name, Social Security number and Date of Birth must be updated or entered using **Options>Enter Dependents**. This can be done at any time prior to printing and does not impact the filing year dependent data unless a dependent was added or deleted.

If you added or deleted a dependent, you can repeat the process of **Dependent Data>Export to excel** and **Dependent Data>Import from excel**, as needed.

Only if all of the filing year's dependent data is incorrect and you wish to start over with fresh data should you click **Dependent Data>Clear this year's dependent data**.

Reprinting forms

1. Click **Options>Release to change and reprint**.
2. The ACA 1094/5 Management (PRE109) screen and menu options are now unlocked for reprocessing.