



aca_create_1095_records

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The following methods are available to create the 1095 records. Depending on your LEAs procedures, you can select the method that best meets your needs.



Remember, if your LEA initially planned to maintain employee insurance data in Personnel throughout the calendar year, you can use the extract method (b.) to create 1095 records. If not, then you can manually create records, import records, or copy records from the prior year.

[a. Manually create records.](#)

Manually create records

To manually add records 1095-B or 1095-C records for each employee, use one of the following maintenance tabs.

- Small LEAs with less than 50 FTEs will use the 1095-B tab to add information on covered individuals.
- Large LEAs (ALEs) with 50 or more FTEs will use the 1095-C tab to update information on covered individuals and Offers of Coverage for employees who were full-time at least one month or more out of the year.

[Personnel > Maintenance > ACA 1095 YTD Data > 1095-B](#)

The screenshot shows a web application interface for maintaining ACA 1095 YTD Data. The breadcrumb trail is "Maintenance > ACA 1095 YTD Data". The page title is "Personnel". There is a "Save" button at the top left. Below it, there are input fields for "Calendar Year" (set to "20XX") and "Employee" (set to "000036 : ARANDA, ALEXIS"). To the right of these fields are buttons for "Retrieve", "Delete", and "Directory". Below the input fields are tabs for "1095-B", "1095-C", "1095-B HIST", and "1095-C HIST", with "1095-B" selected. A "Coverage Type" dropdown menu is set to "B - Employer-sponsored coverage". Under the heading "Covered Individuals", there is a table with columns: "Delete", "First Name", "Middle Name", "Last Name", "Generation", "SSN", "DOB", "All", "Jan", "Feb", "Mar", "Apr", "May", "Jun", "Jul", "Aug", "Sep", "Oct", "Nov", "Dec". The first row contains: "Alex", "", "Aranda", a dropdown menu, "555-55-5555", "10-04-2005", a checked checkbox, and 12 empty checkboxes for the months. At the bottom left of the table are "First", "Last", and a "0" with left and right arrows. At the bottom right is an "Add" button.

[Personnel > Maintenance > ACA 1095 YTD Data > 1095-C](#)

b. Extract records.

Extract records

Use the [Personnel > Utilities > Extract Insurance Data to 1095 Data](#) page to extract insurance data from the [Personnel > Maintenance > Staff Demo > Insurance](#) tab to the [Personnel > Maintenance > ACA 1095 YTD Data](#) maintenance page(s). Most data will populate accurately; however, there are some records that may require manual edits.

Utilities > Extract Insurance Data to 1095 Data Personnel

Execute

Extract Option

Insert new records from Staff Demo Insurance Records.

Delete all existing records and insert all records from Staff Demo Insurance Records.

Plans Options

Self-Insured Plans

Non Self-Insured Plans

Record Type

ACA 1095-B

ACA 1095-C

Calendar Year (YYYY): 20XX

Plan Start Month: 09

Offer of Coverage: 1E - Offer to employee, spouse, and dependents

Safe Harbor: 2C - Employee enrolled in coverage offered

Employees with Calendar YTD Data Who Do Not Have Staff Demo Insurance Records

Pay Type 1-3 Employees

Pay Type 1-4 Employees

Employee Share of Lowest Cost Monthly Premium

	All	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Pay Type 1:	161.00	161.00	161.00	161.00	161.00	161.00	161.00	161.00	161.00	192.00	192.00	192.00	192.00
Pay Type 2:	161.00	161.00	161.00	161.00	161.00	161.00	161.00	161.00	161.00	192.00	192.00	192.00	192.00
Pay Type 3:	161.00	161.00	161.00	161.00	161.00	161.00	161.00	161.00	161.00	192.00	192.00	192.00	192.00
Pay Type 4:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Under **Extract Option**, select one of the following options:

- **Insert new records from Staff Demo Insurance Records.** - This option only inserts new information entered on the Staff Demo page since the last time 1095 data was extracted.
- **Delete all existing records and insert all records from Staff Demo Insurance Records.** - This option clears previously extracted 1095 data for the calendar year indicated and replaces it with the current data available in the Staff Demo insurance records.

Under **Plan Options**, select **Self-Insured Plans**.

Under **Record Type**, select **ACA 1095-C**.

In the **Calendar Year (YYYY)** field, type the calendar year for which you want to extract data.

In the **Plan Start Month**, type the month for which you want to extract data. In this example, we will use *09*.

In the **Offer of Coverage** field, indicate the offer of coverage for which you want to extract. In

this example, we will use *1E (offer to Employee, Spouse and Dependents)*.

In the **Safe Harbor** field, indicate the safe harbor code for for which you want to extract. In this example, we will use *2C (Employee enrolled in coverage offered)*.

Under **Employees with Calendar YTD Data Who Do Not Have Staff Demo Insurance Records**, select one of the following options:

- **Pay Type 1-3 Employees** (excludes subs)
- **Pay Type 1-4 Employees**

Under **Employee Share of Lowest Cost Monthly Premium**, in the **All** field, type the set share of the lowest-cost monthly premium amount for employees in each pay type (1-4). This is the lowest premium the employee could have paid to obtain coverage.

For example, if your LEA pays \$225 toward insurance for all employees and TRS ActiveCare Primary had the lowest premium for employee only coverage, the amount will be \$161 for Jan - Aug and \$192 for Sept - Dec. ($\$386 - \$225 = \$161$ and $\$417 - \$225 = \$192$.)

Notes:

- This allows all employee forms to indicate that they were offered coverage all year and chose to enroll in that coverage all year. Although, this may not be the exact scenario, it will most likely be the case for the majority of employees.
- Be sure to manually correct the data for those employees who had a different situation. For example, employees who did not work all year at the LEA, employees who opted out of the insurance, substitutes for whom the LEA did not pay the \$225, etc.
- You can make the manual corrections on the Personnel > Maintenance > ACA 1095 YTD Data. Be sure to retrieve data for the appropriate calendar year, update the necessary fields, and save the changes.

The below example provides a possible scenario of changes for this employee:

Offer of Coverage:

- 1H (No offer) for January through August assuming that the employee started at the LEA in late August.
- 1E (Offer to Employee, Spouse and Children) for September – December. This was extracted so no changes were made.

Employee Share:

- The Employee Share would be 0.00 for January – August since no coverage was offered as the employee started late August.
- \$161.00 extracted for September – December, assuming the LEA's contribution was \$225.00 and should not require a change.

Safe Harbor:

- 2A (Employee was not employed on any day of the month) for January – July
- 2B (Employee was not a full-time employee and not enrolled in coverage) for August with the assumption that the employee started late in August and did not enroll in coverage until September.
- 2C (Employee enrolled in coverage offered) for September – December

Covered Individuals:

- Selected **Self-Insured** as the LEA provided coverage.
- In the **Plan Start Month**, type 09 as the coverage started in September.
- Selected the **Employee** check box.
- Selected the September – December check boxes as those are the only months of coverage.

c. Import 1095 data.

Import records

Use the [Personnel > Utilities > Import ACA 1095-B/1095-C Data](#) page to import 1095 records.

Review the [1095-C Offers of Coverage File Layout](#).

d. [Copy prior year 1095-B and 1095-C records](#).

Copy prior year 1095-B and 1095-C records

If you choose, you can copy records from the prior year to the new year. After you have copied the data, you can manually edit the records or add new records.

On the Personnel > Tables > ACA 1095 Codes tabs, review the ACA tables to ensure that the relevant data exists.

- For 1095-Bs, add or edit the Coverage Type tab as needed.
- For 1095-Cs, add or edit the Offer of Coverage and Safe Harbor tabs as needed. Be sure to verify that you are using valid codes for the applicable calendar year.

Use the [Personnel > Utilities > Copy 1095 Data](#) page to copy 1095 records.

Under **Extract Option**, select whether you want to **Copy new records only**, or **Delete all existing records and copy all records**.



TIP: If the LEA is just starting the process this year, it is recommended to select **Delete all existing records and copy all records**.

Under **Record Type**, select the form type **ACA 1095-B** or **ACA 1095-C**.

If copying 1095-Bs, you only have to indicate the from and to calendar year and click **Execute**.

In the **From Calendar Year (YYYY)** field, type the calendar year from which you want to copy records.

In the **To Calendar Year (YYYY)**, type the calendar year to which you want to copy records.

If copying 1095-C records, in the **Plan Start Month** field, type 09 (September).

In the **Employee Share of Lowest Cost Monthly Premium**, enter the amount equal to the lowest premium for employee only coverage – your LEA & state contribution. For example, if the LEA/state contributes \$225.00 and TRS ActiveCare Primary had the lowest premium for employee only coverage, the amount will be \$192.00. ASCENDER will automatically use the ‘old’ rate of \$161.00 in Jan – Aug, then switch to the ‘new’ rate of \$192.00 beginning with the **Plan Start Month** of September.

Click **Execute**. If there are any errors, make corrections as needed.

Once the 1095 records are created or copied over from the prior year, you can make manual changes as needed using the Personnel > Maintenance > ACA 1095 YTD Data tabs.

The following are a few examples of possible edits that may be required after creating the 1095 records:

- Adding or deleting coverage for employees or dependents
- Deleting employees who left during the calendar year or who were not paid during the reporting year
- Adding new employees to your LEA

When making changes, be sure to retrieve the appropriate employee for the current calendar year, make the necessary changes, and then click **Save**.