

Extract Insurance Data to 1095 Data - HRS7965

Table of Contents

Extract Insurance Data to 1095 Data - HRS7965 1

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Personnel > Utilities > Extract Insurance Data to 1095 Data

This page is used to extract insurance data from the Maintenance > Staff Demo > Insurance tab to the **Covered Individuals** section on the Personnel > Maintenance > ACA YTD Data > 1095-B and 1095-C pages.

You must be logged on to a current year pay frequency to access this utility.

Notes:

If **Insert new records from Staff Demo Insurance Records.** is selected:

- If 1095-B or 1095-C employee records exist without coverage data, then the 1095-B or 1095-C coverage rows are inserted.
- If 1095-B or 1095-C employee records exist with coverage data, then no new coverage rows are inserted.
- If insurance plan data is available but no coverage data, a 1095-B or 1095-C employee record is created if it does not exist.

The **All** field is only selected if the employee has coverage for the entire year based on the **Coverage Begin** and **Coverage End** dates on the Maintenance > Staff Demo > Insurance page.

Individual month check boxes are selected based on the earliest **Coverage Begin** and latest **Coverage End** date.

Staff demo insurance coverage records are combined when multiple records have the same first name, middle name, last name, social security number, and date of birth.

If a staff demo insurance coverage record exists where the **Coverage End** date is less than the selected calendar year or the **Coverage Begin** date is greater than the selected calendar year, then the 1095-B and 1095-C records are inserted without selected check boxes.

Extract data:

❑ 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 one of the following plan options to extract:

Additional extract notes

- **Self-Insured Plans**
- **Non Self-Insured Plans** - If selected and ACA 1095-C records are extracted, no individual coverage records are extracted from the employee insurance table.

❑ Under **Record Type**, select one of the following options:

- **ACA 1095-B** (selected by default)
- **ACA 1095-C**

Field	Description
Calendar Year (YYYY)	Type the calendar year for which you want to extract data.

❑ If **ACA 1095-B** is selected, in the **Coverage Type** field, click ⌄ to select the coverage type to be extracted.

Coverage types

A - Small business health options program (SHOP)
B - Employer-sponsored coverage
C - Government-sponsored program
D - Individual market insurance
E - Multiemployer plan
F - Miscellaneous minimum essential coverage

❑ If **ACA 1095-C** is selected, enter data in the following fields:

Plan Start Month	Type the two-digit number (01 through 12) indicating the calendar month during which the plan year begins for the health plan in which the employee is offered coverage (or would be offered coverage if the employee were eligible to participate in the plan). If more than one plan year could apply (for instance, if the ALE Member changes the plan year during the year), enter the earliest applicable month.
Offer of Coverage	Click ⌄ to select the coverage offer to be extracted. The selected **Offer of Coverage** code is populated in the **All** column. Coverage offers *1A - Qualifying Offer* *1B - Offer to employee only* *1C - Offer to employee and dependents* *1D - Offer to employee and spouse* *1E - Offer to employee, spouse, and dependents* *1F - Offer of coverage not providing the minimum value* *1G - Employee not full-time and enrolled in self-insured coverage* *1H - No offers* *1I - Qualifying offer transition relief - This option is no longer available, it was only applicable for the 2016 tax year.* *1J - Offer to employee, spouse conditional, not to dependents* *1K - Offer to employee and dependents, spouse conditional*

Safe Harbor	Click ⌄ to select the safe harbor code to be extracted. The selected **Safe Harbor** code is populated in the **All** column. Safe Harbor codes *2A - Employee not employed on any day of the month* *2B - Employee not a full-time employee for the month and did not enroll in coverage* *2C - Employee enrolled in coverage offered* *2D - Employee was in a Limited Non-Assessment Period* *2E - Multiemployer interim rule relief* *2F - W-2 safe harbor* *2G - Federal poverty line save harbor* *2H - Rate of pay safe harbor* *2I - Non-calendar year transition relief* - This option is no longer available, it was only applicable for the 2016 tax year.

❑ Under **Employee Share of Lowest Cost Monthly Premium**, type the set share of the lowest-cost monthly premium amount for employees in each pay type (1-4).

- The **Employee Share** field should only be entered if the **Offer of Coverage** field is set to *1B (Offer to employee only)*, *1C (Offer to employee and dependents)*, *1D (Offer to employee and spouse)*, or *1E (Offer to employee, spouse, and dependents)*. Offer of coverage codes *1J - Offer to employee, spouse conditional, not to dependents* and *1K - Offer to employee and dependents, spouse conditional* are included if the **Calendar Year** is set to 2016.
- If the set share of the lowest-cost monthly premium amount is the same for all 12 calendar months, type that monthly amount in the **All** field and do not enter data in the individual month fields.
- If the set share of the lowest-cost monthly premium amount was not the same for all 12 calendar months, type that monthly amount in the respective month (**Jan**-**Dec**) fields.

Note: When the data is extracted, if the **All** field is populated, the individual monthly fields are set to zero. If the individual monthly amounts are entered, the **All** column is set to zero and the individual monthly fields are populated.

- Only one set of values can exist for each local education agency (LEA); therefore, these values should not be updated by individual users.
- The values are saved upon clicking **Execute**.

❑ 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**
- **Pay Type 1-4 Employees**

❑ Click **Execute** to execute the process.

If any errors are encountered, an Extract Staff Demo Insurance Data to 1095-B/1095C Error Report is displayed. Review the report.

❑ Click **Cancel** to return to the Extract Insurance Data to 1095 Data page.

A message is displayed indicating that the process was completed successfully. The extracted records can be viewed and modified on the Personnel > Maintenance > ACA 1095 YTD Data page.


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Back Cover