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United States Affordable Care Act Year-End Processing for
2019

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Describes how to perform year-end tasks for producing Health Coverage Information Returns, including data preparation and setup, generating and working with reporting information, and printing forms and reports.

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Preface

Welcome to the JD Edwards World United States Affordable Care Act Year-End Processing for 2019.

Audience

This guide is intended for implementors and end users of the JD Edwards World United States Affordable Care Act Year-End Processing for 2019.

JD Edwards World Products

This guide refers to the *JD Edwards World Human Resources Guide*.

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The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

Convention	Meaning
<i>italic</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 in examples, text that appears on the screen, or text that you enter.

Introduction to Affordable Care Act Health Coverage Returns (AIR)

This chapter contains the following topics:

- Section 1.1, "Overview"
- Section 1.2, "ACA Health Coverage Information Returns (AIR) Features"
- Section 1.3, "Release Levels"
- Section 1.4, "ACA Information Returns Processing for 2019"
- Section 1.5, "Preparation for AIR Year-End Reporting"
- Section 1.6, "The AIR Year-End Processing Cycle and Process Flow"

1.1 Overview

This guide describes how to perform year-end tasks for producing Affordable Care Act (ACA) Health Coverage Information Returns, including data preparation and setup, generating and working with reporting information, printing forms and reports, and electronic filing.

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

The Affordable Care Act Health Coverage Information Returns (AIR) presents a unique set of reporting requirements to employers. All Applicable Large Employer (ALE) Members are required to file Forms 1094-C and 1095-C for 2019.

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 of the Internal Revenue Code about offers of health coverage and enrollment in health coverage for their employees.

Form 1095-C is used to:

- Provide printed information for full-time employees to use when filing their tax returns.
- Report information about 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 Internal Revenue Service (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.

Form 1094-C is used to:

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

1.2 ACA Health Coverage Information Returns (AIR) Features

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

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

The system supports the following ACA year-end forms:

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

These ACA year-end forms serve as important documents for employees, employers, and the IRS.

1.3 Release Levels

The software for processing U.S. ACA year-end information is available for JD Edwards World release A9.4 and A9.3.1.

1.4 ACA Information Returns Processing for 2019

All ALE Members are required to file Forms 1094-C and 1095-C for 2019. Final forms and form instructions are available on the IRS website at

<https://www.irs.gov/forms-pubs>

1.4.1 Who Must File Forms 1094-C and 1095-C

ALEs (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 full-time employee 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, whether or not 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 months 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 ALE 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 to cover under a health coverage plan

1.4.1.1 Authoritative Transmittal for Employers Filing Multiple Forms 1094-C

Each original submission to the IRS contains one Form 1094-C and a number of Form 1095-Cs. An employer may create as many submissions as required. 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 the summary information for the employer.

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

1.4.2 When to File Forms 1094-C and 1095-C

You need to meet the requirements to file Forms 1094-C and 1095-C, and verify 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.

You must distribute Form 1095-C to employees by January 31 of the year following the calendar year to which the return relates. JD Edwards currently supports only paper distributions to employees.

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. For calendar year 2019, Forms 1094-C and 1095-C are required to be filed with the IRS by February 28, 2020, if filing on paper, or March 31, 2020, if filing electronically.

If you are required to file 250 or more information returns, you must file 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 does not support paper filing of information returns to the IRS.

1.4.3 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. Once the workfiles have been built and reviewed, you will produce paper Form 1095-Cs for sending to recipients. Then, 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).

1.4.4 Furnishing Paper Form 1095-Cs to Recipients

You should meet the requirement to furnish Form 1095-C to an employee 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.

Generally, an employer 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.

1.4.4.1 Correcting Paper Form 1095-Cs Furnished to Recipients

If you want to make corrections to the Form 1095-Cs that were distributed to employees or other recipients before they are submitted to the IRS, you may make changes to the original Form 1095-C records in the system and reprint the forms for distribution to employees. Do not mark the CORRECTED box, instead, write the word *Corrected* on the paper form. These records will still be considered original when submitted to the IRS.

1.4.5 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 the Affordable Care Act Information Returns System (AIR). The transmission of returns must be in the defined XML format within the 100 MB limit.

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 <https://www.irs.gov/>. See the IRS publications 5164, 5165, and the IRS AIR program for more information.

1.5 Preparation for AIR Year-End Reporting

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

1.5.1 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. For calendar year 2019, Forms 1094-C and 1095-C are required to be filed by February 28, 2020, or March 31, 2020 (if filing electronically).

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).

To receive a waiver from the required filing of information returns electronically, submit Form 8508. You can request for 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.

1.5.2 Government Regulations

JD Edwards World believes the IRS information that is included for your reference in this guide to be accurate as of the date of its publication; however, 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 authoritative information and for guidance about filing requirements.

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

1.5.3 Supported Forms

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

1.5.4 Filing Paper Forms with the IRS

If you are filing your returns on paper, see Pub. 5223 for specifications about 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 does not support paper filing of health coverage returns with the IRS, and therefore does not support a printed Form 1094-C or 1095-C for filing to the IRS. JD Edwards does support the printing of Form 1095-C for recipients.

1.5.5 Electronic Filing of ACA Information Returns

After the Form 1095-Cs have been printed and the 1094-C Build Employee Counts have been run, go to menu G08ACAEEF. Select Work with 1094-Cs, select the unsubmitted 1094-Cs for inclusion in a transmission, and then request a transmission build. The transmission build creates the XML Form Data file and XML Manifest file. You can transmit these files to the IRS through the AIR System Web Portal. You must record the Receipt ID and submission date returned in the Web Portal on the transmission record. Once the file is processed, the IRS displays a transmission status. You must record the transmission status on the transmission and possibly the submission records.

Prerequisites

Before you file the ACA Information Returns electronically, complete the following tasks:

- Register a responsible official and your contacts for a login with IRS E-Services.
- Apply for and receive a Transmitter Control Code (TCC).
- Pass a communication test with the AIR system and receive confirmation that your TCC has been placed in production status.

For more information, see [Section 6.4, "Creating and Reviewing Submitted or Transmitted Form 1094-C"](#)

1.5.5.1 Registering for IRS e-Services

Employers who are the Transmitter (file ACA Information Returns electronically using the AIR system) must have at least one responsible official (and optionally, other contacts) who register personally with IRS e-Services. After making an application online, the registrant receives an IRS e-Services User ID and Password through the United States Postal Service (USPS) mail, which is required later to log into the AIR system.

1.5.5.2 Applying for a Transmitter Control Code

After receiving an IRS E-Services login, the responsible official must apply for a Transmitter Control Code (TCC). If you have multiple employers, one employer may act as the transmitter for all of your employers. When registering for a TCC, you must request the role of Transmitter and optionally the role of Issuer. Oracle JD Edwards World is registered with the role of Software Developer. The JD Edwards system is designed to use the AIR-UI Channel exclusively.

1.5.5.3 AIR System Communications Test

Once you have received your Transmitter Control Code, you must submit a one-time test transmission, called a communications test. This test verifies your ability to submit information returns with the AIR system. You utilize one of the test scenarios described in IRS publication 5164 - Test Package for Electronic Filers of Affordable Care Act (ACA) Information Returns (AIR). Your communications test must use your transmitter TCC and the Software Vendor ID for JD Edwards World, which is

provided by Oracle JD Edwards. Your communications test must be Accepted or Accepted with Errors. Once the test transmission has been accepted, you call the IRS to verify the completion of the communications test and have them put your TCC in production status.

1.5.6 Correcting Accepted Form 1094-C and Form 1095-C

Corrections can only be made to previous submissions that have been Accepted or Accepted with Errors. Transmissions containing correction records must only contain corrections and should not include any Originals. The unique identifiers assigned by AIR allow corrections to the specific record(s), both transmittal records (Forms 1094) and information return records (Forms 1095). Corrections may be filed for the following form types:

- Form 1094-C
- Form 1095-C

1.5.7 Correcting Printed Form 1095-Cs Filed with the IRS

If making changes to paper Form 1095-Cs that were previously filed with the IRS, you will make changes to the 1095-C records in the JD Edwards system and reprint them. You must manually mark the CORRECTED box with an X.

Note: JD Edwards does not support filing paper Forms 1094-C and 1095-C with the IRS.

1.5.8 Transmission or Submission Definitions and Limitations

An AIR system transmission using the UI Channel consists of one XML Form Data file and one XML Manifest file. Transmissions:

- Consist of one or more submissions
- Must not contain submissions of different types (must not have both Forms 1094-B or 1095-B and Forms 1094-C or 1095-C in the same transmission)
- The Form Data file may not exceed 100 MB of uncompressed native XML.
- A transmission must not mix Original and Corrected submissions.

Submissions:

- Consist of one 1094-C and zero or more 1095-Cs.
- The reported number of information returns on the 1094-C transmittal form must match the actual number of information returns.
- If a transmission or submission is larger than 100 MB, the batch transmission build program automatically breaks up the transmission into two or more transmissions in the following way:
 - The first submission consists of the Forms 1094-C and as many Forms 1095-C as will fit within the 100 MB limit
 - The subsequent submission(s) will include Forms 1094-C, and as many associated Forms 1095-C as can be contained without exceeding the 100 MB size limit.

1.5.9 Submitting Records to the IRS

The transmission or submission process results in several different outcomes based on the data transmitted.

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

- A: Accepted
- E: Accepted with Errors

If submitted, but the status of the submission is blank, no change or delete is allowed because the transmission or submission is in progress.

1.5.10 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 <https://www.irs.gov/uac/about-form-1094-c> and <https://www.irs.gov/uac/about-form-1095-c>.

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

1.6 The AIR Year-End Processing Cycle and Process Flow

This section discusses:

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

1.6.1 AIR Year-End Processing Cycle

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

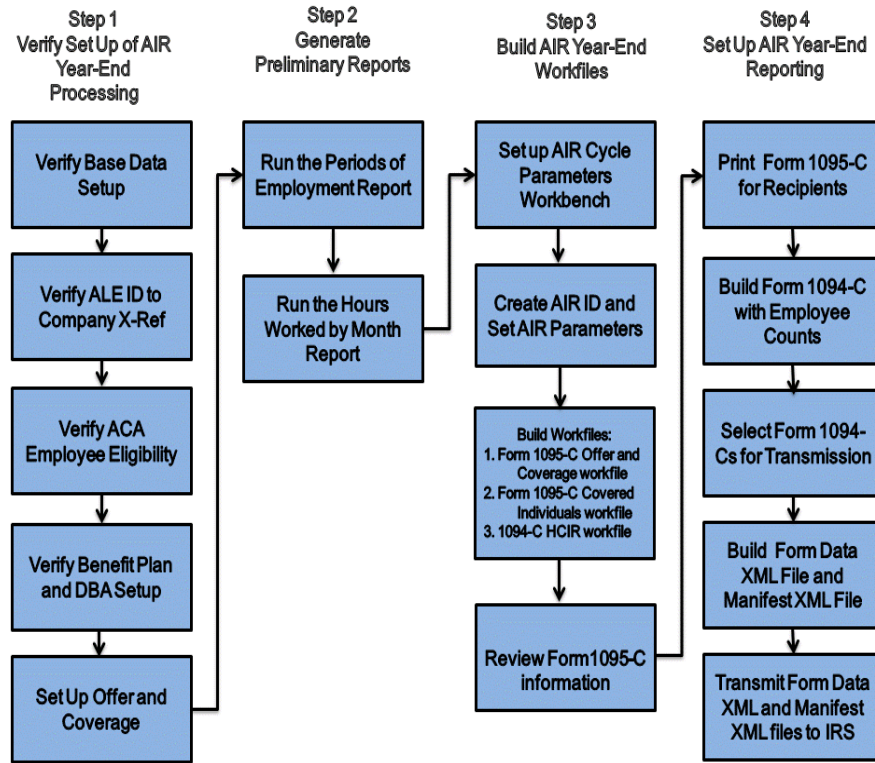
Task	Corresponding Documentation and Information
Install the update	You must install the update to run year-end ACA programs. This guide does not include software installation instructions and the necessary program-specific instructions (ASIs).
Verify company setup	If you have multiple companies with the same Tax ID, you have to designate which one is the parent. The parent is then considered the reporting company. The reporting company should be in the Company Constants (G0541/2) and the Company Names and Fiscal Dates (F15 from G0541/2). You have to designate which company is the reporting company by utilizing the Parent Address field in the fold on the Corporate Tax IDs (G0541/5).

Task	Corresponding Documentation and Information
<p>Verify employee setup.</p> <p>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.</p>	<p>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 run the Address Book Who's Who file (F0111) Conversion program on menu G06UDM to ensure that all employee names are formatted correctly.</p>
<p>Set up base data.</p> <ul style="list-style-type: none"> ■ Set up ALE ID to Home Company Cross-Reference. ■ Verify employee ACA eligibility data. ■ Verify benefits enrollment information. ■ Set up Employee Offer and Coverage information. ■ Set up Manifest Information 	<p>Chapter 2, "Setting Up AIR Year-End Processing"</p>
<p>Generate preliminary workfiles.</p> <ul style="list-style-type: none"> ■ Periods of Employment Build ■ Hours Worked by Month Build 	<p>Chapter 3, "Generating ACA Health Coverage (AIR) Preliminary Builds and Reports"</p>
<p>Build AIR Year-End workfiles.</p> <ul style="list-style-type: none"> ■ 1095-C Offer and Coverage workfile ■ 1095-C Covered Individuals workfile for self-insured plans ■ 1094-C Transmittal Workfile 	<p>Chapter 4, "Setting Up ACA Information Returns Workfiles"</p>
<p>Review and validate workfile information online and with printed reports.</p>	<p>Chapter 5, "Reviewing ACA Information Returns (AIR) Workfile Information"</p>
<p>Print forms.</p> <p>Print Form1095-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.</p> <p>Upload transmission XML files to the IRS.</p>	<p>Chapter 6, "Producing AIR Year-End Deliverables"</p>

1.6.2 AIR Year-End Process Flow

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

Figure 1-1 AIR Year-End Process Information Workflow



Setting Up AIR Year-End Processing

This chapter contains the following topics:

- [Section 2.1, "Understanding Base Data-Setup for AIR Year-End Processing"](#)
- [Section 2.2, "Setting Up Data for Generating AIR Reports"](#)
- [Section 2.3, "Setting Up Benefit Plans and DBA Setup"](#)
- [Section 2.4, "Setting Up Employee Offer and Coverage \(Line 14-16 of Form1095-C\)"](#)
- [Section 2.5, "Setting Up Manifest Information Revision \(P08213\)"](#)

2.1 Understanding Base Data-Setup for AIR Year-End Processing

Before you print the Affordable Care Act Health Coverage Returns (AIR) year-end government 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 Affordable Care Act (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. You can find an employee name from the Address Book Who's Who file (F0111) and the employee address from the Address By Date file (F0116).
- **Company Setup**

Verify the format of the company names and addresses in the Address Book system for the reporting companies to ensure that the information you report to the government and to the employees is accurate. You can find an employer name from the Mailing Name in the Address Book Who's Who file (F0111) and the employer address from the Address By Date file (F0116) for the address book record associated with the reporting company. You can search for the contact telephone number from a processing option for the Form 1095-C Print (P085192) or, if left blank, it takes a value from the 1094-C Transmittal file (F08121).

Note: If you are using the Parent Address field in the Corporate Tax ID's for the home company, the name and address used is associated with the parent (reporting) company, not the home company.

The Reporting Company must be set up in Company Numbers and Names file (F0010). The Company Address Number is retrieved from the Company Numbers and Names file (F0010).

- Dependents information

See “Reviewing the Dependents and Beneficiaries Report” in the *JD Edwards World Human Resources - Benefits 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, then you might not have all of required data in the system to produce Information Returns. The system provides the ability to import data into certain ACA tables as well as to the reporting workfiles. You also have the ability to add, edit or delete information in the reporting workfiles.

2.2 Setting Up Data for Generating AIR Reports

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

- Add company members to ALE.
- Generate ACA Hours of Service report.
- Verify ACA employee eligibility.

2.2.1 Adding Company Members to ALE

The ALE ID To Home Company X-Ref program allows multiple Home Companies to be grouped together under the same ALE ID, which effectively creates an Aggregated ALE Group. Each individual employer in an Aggregated ALE Group is referred to as an ALE Member.

The system stores the ALE information in the ALE ID To Home Company Cross Reference file (F08116).

For more information about adding company members to ALE, see “Creating ALE ID To Home Company X-Ref” in the *JD Edwards World Human Resources Guide*.

2.2.2 Generating ACA Hours of Service Report

As a part of producing ACA Health Coverage Information Returns, employees who should receive Form 1095-C must have an Employee ACA 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 may optionally use the Hours of Service report process to create Employee ACA 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 (P08416) 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 used to measure an employee's hours of service for a prior period in order to determine 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 prior to benefits enrollment periods. The Hours of Service report can also generate ACA Employee Eligibility records 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 more information about generating the ACA Hours of Service report, see "ACA Hours of Service (Proof and Final) Mode (P08416)" in the *JD Edwards World Human Resources Guide*.

2.2.2.1 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.

2.2.3 Verifying ACA Employee Eligibility

Access the Employee Eligibility window (P081161) to review employee eligibility information created by the Hours of Service report. The ACA Hours of Service report indicates an employee's full-time eligibility status for each month of the reporting year. This status determines whether an employee is eligible for benefits coverage and should be offered 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 Limited Non-Assessment Period information (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 more information about LNAPs, see the IRS 2019 Instructions for Forms 1094-C and 1095-C under Definitions.

For more information about reviewing employee eligibility details, see “Reviewing Employee Eligibility” in the *JD Edwards World Human Resources Guide*.

2.3 Setting Up Benefit Plans and DBA Setup

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 DBAs to report.

Set the benefits plan for:

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

2.3.1 Setting Up Benefits Plan

Complete the setup for benefit plans to identify:

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

For more details, see [Section 7.19, "1095-C Offer and Coverage Report \(P08519\)"](#).

See Also: For more information about benefits plans, see the *JD Edwards World Human Resources - Benefits Guide*.

2.3.1.1 Reportable Health Coverage Plans

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

To identify a plan as reportable for health coverage information returns, use the Plan Master Plan Type field. You can use any User-defined Code (UDC) value for Plan Type, but the UDC value must have the value of M in the UDC Special Handling Description.

2.3.1.2 Self-Insured Plans

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

2.3.1.3 Waived Health Coverage Plans

The system must 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, verify the Plan Description. The system determines a waived

or declined plan from the value in the Description. For example, all Plans whose descriptions begin with W means that the employee was offered health coverage.

2.3.2 Setting Up DBAs

Complete the DBA setup to identify:

- Reportable health coverage DBAs
- Self-insured DBAs
- Setup Without a Benefits Plan for Employees Who Have Waived Health Coverage

2.3.2.1 Reportable Health Coverage DBAs

The system must determine which DBAs are reportable health coverage DBAs and therefore which deductions or benefit should be considered for reporting.

To identify a DBA as reportable for health coverage information returns, use a Category Code associated to the DBA in the DBA SetUp/Category Code Setup window that you have designated to identify reportable DBAs. Also, select the value that you are using to indicate that the plan is self-insured and update the Category Code with that 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.

2.3.2.2 Self-Insured DBAs

The system must determine which DBAs are self-insured 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 DBA is for self-insured coverage, select a Category Code associated to the DBA that you define as the indicator for a Self-Insured DBA. Also, select the value that you are using to indicate that the DBA is self-insured, and update the Category Code with that value.

2.3.2.3 Setup Without a Benefits Plan for Employees Who Have Waived Health Coverage

When you are not using a benefits plan, and you want to indicate that an employee has waived health coverage offered, you must set up the employee with an eligibility code on the Employee Master form and 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 waived period, 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 the value Yes, and the dates are blank, then the system will assume that the waive covers the entire reporting year.

2.4 Setting Up Employee Offer and Coverage (Line 14-16 of Form1095-C)

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

- Set up lines 14, 15, and 16 for reporting in Form 1095-C, Part II.

- Add or update Employee Offer and Coverage Setup.

2.4.1 Understanding Offer and Coverage Setup

The Offer and Coverage Setup (P08117) is used to enter and maintain the employee health coverage information for the Affordable Care Act. The data resides in the Offer and Coverage Setup file (F08117).

You can use the Offer and Coverage Setup (P08117) to set up values for lines 14, 15, and 16 of Form 1095-C, Part II.

Form 1095-C Part II Employee Offer and Coverage contains the following categories:

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

You can enter and track the information in one of following three ways:

- Plan ID/Plan Option

You must enter a Plan ID, but the addition of the Plan Option is optional. The Plan ID must exist in the Plan Master file (F08320). If you enter a Plan Option it must exist in the Plan Additional Options file (F083202).

- DBA Code/Union Code

You must enter a DBA Code, but the addition of the Union Code is optional. The union code must be a valid UDC from the 07/UN UDC for data item UN. The DBA Code must exist in the Payroll Transaction Constants file (F069116) and must be greater than or equal to 1000, indicating that it is a deduction, a benefit, or an accrual.

- Employee Number

You must enter a valid Employee ID in the Address Book Number. Setup entered at the Employee Number level is considered an Employee override.

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

- Based on an employee's benefit enrollment (F08330), setup values are determined based on Plan or Plan Option setup.
- Based on employee DBA Transaction history (F0719), setup values are determined based on DBA number, with or without Union Code.
- Setup associated to an Employee number overrides other setup values.

2.4.2 Working With Employee Offer and Coverage Setup (P08117)

The offer of coverage code 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 that corresponds to the actual health coverage benefit that the employee enrolled in is reported on Form 1095-C, Part II, Line 15 in the *All 12 Months* column or in the Jan-Dec columns. Line15 is to be completed only if code 1B, 1C, 1D, or 1E is entered in line 14.

The reason for no offer of coverage is reported on Form 1095-C, Part II, Line 16 in the All 12 Months column or in the Jan-Dec columns. The reason for the gap could be several, including termination, leave of absence, transfer to another company, and so on.

To set up Offer and Coverage program Setup (P08117)

Navigation

From Human Resources (G08), select Affordable Care Act

From Affordable Care Act (G08ACA), enter 29

From ACA Information Returns Setup (G08ACA41), select Offer and Coverage

1. In the Offer and Coverage program (P08117), complete the following fields:

Field	Description
Plan ID	Enter an abbreviation or number that identifies a specific employee benefit. For example, Employee Health Insurance, Accidental Death and Dismemberment, 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.
Plan Option	Enter a value from the Plan Master Option 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.
DBA Code	Enter a value that defines the type of pay, deduction, benefit, or accrual. Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.
Union Code	Enter a value from UDC 07/UN that represents the union or plan in which the employee or group of employees work or participate.
Employee No.	Enter the Address Book Number.
1095-C Line	Enter a value that indicates the line number on Form 1095-C to which the employee Offer and Coverage setup record pertains. Note: When using the value #ALL to establish a record with values for all three lines, do 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, complete the set up only for specific line numbers.
From First Day of Month	Enter the first day of the month the record becomes effective.
Thru Last Day of Month	Enter the last day of the month the record is no longer effective.
Offer of Coverage	Enter the IRS-defined Code Series 1 that specifies the type of coverage, if any, offered to an employee, the employee's spouse, and the employee's dependents. If the employee was not offered coverage, enter Code 1H in this field.

Field	Description
Monthly Premium	<p>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.</p> <p>The value in this field is set to zero when the employee is offered coverage but is not required to contribute towards the premium.</p> <p>The monthly premium value can be entered only for 1B, 1C, 1D, 1E, 1J and 1K Offer and Coverage codes.</p>
Safe Harbour	<p>Use this processing option to specify the IRS-defined Code Series 2 to report that one of the following situations applied to the employee for all 12 months of the calendar year:</p> <ul style="list-style-type: none">▪ 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 multi-employer interim rule relief.

2.5 Setting Up Manifest Information Revision (P08213)

This section provides an overview of the manifest validation, and discusses how to validate the transmitter information.

2.5.1 Understanding Manifest Information Revision

When sending the electronic filing XML files to the IRS, two files are required for each transmission. The Form Data File contains the 1094-C and 1095-C information. Each Form Data File is accompanied by a Manifest File, which contains general transmitter information and overall attribute information about the Form Data File.

Note: While filing the returns, you must use the Manifest XML file corresponding to the year that you are filing the returns. For example, if you are filing the returns for the year 2019, you must use the Manifest XML file corresponding to the year 2019 and not 2018.

The Manifest Information program allows you to enter and maintain the manifest information to be used when creating transmissions. The data resides in the Manifest Information file (F08213) and will appear on the ACA Transmission record in F08211 as well as in the Manifest XML file.

The form data file and manifest file are included in an XML file. Once the required information is interactively entered, the client uses their Web Browser to browse for the respective XML file that contains Forms 1094-C and Forms 1095-C along with the XML file and uploads the files to the IRS.

You may add, change, or delete the records in this file.

2.5.2 Validating the Manifest Information Revision

Transmitters or Issuers must have an active IRS account and have been approved to transmit ACA Information Returns. Refer to the *IRS publications AIR Submission Composition and Reference Guide* and *Publication 5165 for Electronically Filing Affordable Care Act (ACA) Information Returns for Software Developers and Transmitters*.

The Transmitter, including Issuer, is required to log in to the IRS Integrated Enterprise Portal (IEP) and invoke the appropriate URL for AIR. AIR allows the Transmitter or Issuer to either transmit submissions to the IRS or retrieve Acknowledgements for those transmissions from the IRS. The transmitter shall select the option to transmit submissions to the IRS.

Before you Begin

Before entering the Manifest information, you have to set up a Transformation Template in World Electronic Document Delivery (EDD) for transforming the JDE Source XML to the IRS XML format. The Manifest Information file (F08213) refers to this template.

To set up Manifest Information Revision (P08213)

Navigation

From Human Resources (G08), select Affordable Care Act

From Affordable Care Act (G08ACA), select ACA Information Returns (G08AIR)

From ACA Information Returns (G08AIR), select Electronic Filing

From Electronic Filing, select Manifest Information Revision

1. In the Manifest Information Revision program (P08213), complete the following fields:

Field	Description
Template Name	This is the name of the Transformation Template. A Transformation Template contains the file names and paths of a Transformation Template File and a Transformation Output File. Enter the name of the Transformation Template you set up for transforming the JDE Source XML to the IRS format XML.
Template Type	Indicates the type of template, such as, XSL or BI Publisher. For the Manifest, the Template Type is: 1: XSL Template
Transmitter Control Code (TCC)	A five-character code assigned to a transmitter by the IRS in order to file electronically. You must apply for and receive this code from the IRS. The TCC is required and is part of the Unique Transmission ID. AIR will extract the TCC from the Unique Transmission ID. AIR verifies if the TCC exists, and if the TCC does not exist, or the TCC is in a state other than <i>Active</i> , the transmission will be rejected.
Transmitter EIN (TEIN)	Indicates the Employer Identification Number (EIN) of the transmitter.
Address Number	Enter the Address Book Number of the Transmitter.

Field	Description
Transmitter Foreign Entity Indicator	Indicates the transmitter is a foreign entity. Valid values are: 0 - Not a foreign entity 1 - Foreign entity
Prior Year Data Indicator	Indicates the transmitter is submitting prior year data. The IRS will validate the XML document against the prior year schema. Valid Values: blank or 0 - Not submitting prior year data 1 - Submitting prior year data
Test File Indicator	Indicates the type of file to be processed. Valid values are: T - ACA Assurance Test File P - Production File
Software Vendor	Identifies the software as being developed by a vendor as well as contact information. Values include, vendor indicator, contact first and last names, and contact phone number.
Software ID	The Software ID assigned to the software when it was registered with the IRS. For JD Edwards World, this Software ID is 15A0000712.

Generating ACA Health Coverage (AIR) Preliminary Builds and Reports

This chapter contains the following topics:

[Section 3.1, "Understanding Health Coverage Preliminary Reports"](#)

[Section 3.2, "Setting Up Periods of Employment Build \(P08518\)"](#)

[Section 3.3, "Setting Up the Hours Worked by Month Build \(P08524\)"](#)

3.1 Understanding Health Coverage Preliminary Reports

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

The batch processes to load the preliminary workfiles are:

- Periods of Employment Build
- Hours Worked by Month Build

3.1.1 Periods of Employment

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

The Periods of Employment report helps to identify, any gap 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 Build (P08518) batch version processes this information from the HR History file (F08042) and updates it in the Periods of Employment file (F08118). P08518 finds occurrences of Date Started and Date Terminated for an employee and sequences them according to effective date in order to construct a history of an employee's employment periods.

You can use the Interactive Inquiry Maintenance program (P08118) to review the periods of employment information. This program retrieves the information from the Periods of Employment file (F08118). You can use the Periods of Employment inquiry program to add, delete, and update data in the Periods of Employment file (F08118).

If you are not using the HR History file, you can use the Periods of Employment Batch Import program (P08118Z) to import existing periods of employment data from a spreadsheet or a comma-delimited file into the Periods of Employment file (F08118).

3.2 Setting Up Periods of Employment Build (P08518)

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

- Run the Periods of Employment Build (P08518).
- Inquire, add, update or delete Periods of Employment records (P08118).

3.2.1 Running the Periods of Employment Build (P08518)

Navigation

From Human Resources (G08), select Affordable Care Act

From Affordable Care Act (G08ACA), select ACA Information Returns

From ACA Information Returns (G08AIR), select Periods of Employment Build

3.2.2 Sample Periods of Employment Report

Figure 3–1 Periods of Employment Report

08518		Oracle - JD Edwards Periods of Employment							
Employee	Employee Name	Date Started	Eff On	Chg Rsn	Description	Date Term	Eff On	Chg Rsn	Description
2022	Kellerman, James	01/07/97	05/02/95			. 01/07/98	01/07/98	TE	Termination-Bli
2111	Ingraham, Paul	15/03/95	15/03/98			. 01/04/96	01/04/96	DS	Permanent Disab
2129	Randolph, Wilma C.	15/03/88	15/01/98			.			
2430	White Jr., Jenny Liz	10/04/89	10/04/89	001	New Hire				
2431	Test, Faithe	10/04/89	10/04/89	001	New Hire				
2432	Faithe, Eate	10/04/89	10/04/89	001	New Hire				
2433	Test, Faithe	10/04/89	10/04/89	001	New Hire				
2434	Bell, Lee	10/04/89	10/04/89	001	New Hire				
2435	Buress, Nancy	10/04/89	10/04/89	001	New Hire				
2441	Canadian2, Faithe G.	01/01/03	01/01/01	001	New Hire				
2450	Decker, Jeanette	10/04/89	10/04/89	001	New Hire				
2451	Decker1, Jeanett	04/04/94	04/04/94	001	New Hire				
2452	Decker2, Jeanette	06/03/72	06/03/72	001	New Hire				
2600	Bean, Pat	10/04/89	10/04/89	001	New Hire				
2601	HUDSON, DERRICK	10/04/89	10/04/89	001	New Hire				
2607	Mcadams, Tina	15/12/03	30/01/13			.			
2805	California, Callie C.	01/01/01	01/01/01	001	New Hire				
2806	California, Colton C.	01/01/01	01/01/01	001	New Hire				
2875	Woods, Tiger	01/01/00	01/01/00	001	New Hire				
2876	Oliver, Brenda	01/01/00	01/01/00	001	New Hire				
2901	TestCC, ESA1	01/06/09	13/06/11	099	**New Hire - Incomplete Setup				

3.2.3 Adding or Updating the Periods of Employment Details

Navigation

From Human Resources (G08), select Affordable Care Act

From Affordable Care Act (G08ACA), enter 29

From ACA Information Returns Setup (G08ACA41), select Periods of Employment

1. In the Periods of Employment Revisions (P08118), complete the following fields:

Field	Description
Address Number	A number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.
Date Started	The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. 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 data codes in the Human Resources system, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.
Change Reason	Enter a code that indicates the reason for change in the start date, such as a new hire or a 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.
Change Reason	A UDC 06/T that indicates the reason an employee's record changes, for example, 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 informational only, and not relevant to Form 1095-C processing.
Months Employed	Displays the number of months employed. This is informational only, and not relevant to Form 1095-C processing.
Years Employed	Displays the number of years employed. This is informational only, and not relevant to Form 1095-C processing.

3.3 Setting Up the Hours Worked by Month Build (P08524)

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

- Setup the processing options and data selection for Hours Worked by Month Report (P08424)
- Set processing options for Hours Worked by Month Build (P08524).
- Run the Hours Worked by Month Build (P08524).
- Run the Hours Worked by Month Report (P08424).
- Add or update hours-worked-by-month records (P08224).

Note: The Hours Worked by Month Report (P08424) runs automatically if you set the processing option for Hours Worked by Month Build (P08524). If you leave the processing option blank, the build does not produce a report.

3.3.1 Hours Worked by Month

As a Benefits Administrator, you use the Hours Worked by Month Revisions (P08124) to review hours worked by an employee by month and by Home Company.

The Hours Worked by Month Build (P08524) calculates the number of hours that the employee worked in a month, by using the timecard history information that is stored in the Employee Transaction History file (F0618). When you run the build, the system updates the Hours Worked by Month file (F08124).

The Hours Worked by Month report (P08424) prints the information created during the Hours Worked by Month Build (P08524).

Note: The data selection for the report must be setup the same as the data selection for the build in order to see only the records created during the build. This is because the report can be run independently from the build.

To review, add, update and delete the hours-worked-by-month information, you use the Hours Worked by Month Inquiry (P08124), which retrieves the information from the Hours Worked by Month file (F08124). The F08124 file stores the hours worked by calendar month and by company.

Note: Each employee who has to be issued a Form 1095-C must have at least one record in this file to indicate the Home Company employer that is equivalent to the ALE Member under which the employee should be reported. If you do not use JD Edwards Payroll or Time and Labor, then you do not have Employee Transaction History (F0618). This information is used to determine the ALE Member (employer) under which an employee must be reported for each month of the reporting year. At least one record must be added or imported for each employee.

The Hours Worked by Month file (F08124) is used to determine the employer for whom the employee worked for each month of the year. Form 1095-C Offer and Coverage Workfile Build references the Hours Worked by Month to determine the employer. 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 the 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 file for a month, for example, because of a leave of absence, the prior month's F08124 data is 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, select one. The system will select the lowest numbered company.

You can use the Hours Worked by Month Inquiry (P08124) to review, add, delete and update data. Any updates to the F08124 file will be overridden when the Hours Worked by Month Build (P08524) is processed again.

If you do not have Employee Transaction History file (F0618) data from which to build the Hours Worked by Month file, you can use the Hours Worked by Month batch import program (P08124Z) for importing grid data to import an employee's hours-worked history from a spreadsheet or a comma-delimited file.

3.3.2 Running the Hours Worked by Month Build (P08524)

The Hours Worked by Month build is run from menu G08AIR.

Navigation

From Human Resources (G08), choose Affordable Care Act

From Affordable Care Act (G08ACA), select ACA Information Returns

From ACA Information Returns (G08AIR), select Hours Worked by Month Build

3.3.3 Running the Hours Worked by Month Report (P08424)

The Hours Worked by Month report is run as part of the build process, if a version is specified in the processing options for the build job. It can also be run independently from the build from the reports menu (G08ACAR).

3.3.4 Sample Hours Worked by Month Report

Figure 3–2 Hours Worked by Month Report

```

08424                                     Oracle
                                           Hours Worked by Month

Reporting Year . . . . . 2015

Employee      Employee Name      Tax ID      Home Co      Jan      Feb      Mar      Apr      May      HOURS WORKED --
                                           -----
36100 Aca, Al      999999991      00001 176.00 160.00 156.00 176.00 168.00 176.00 184.00
36101 Aca, Becky  999999991      00001 176.00 160.00 156.00 176.00 168.00 176.00 184.00
36102 Aca, Carly  999999991      00001 176.00 160.00 156.00 176.00 168.00 176.00 184.00
36103 Silvers, Ramon  999999991      00001      86.67
36104 Nordstat, Sven  999999991      00001      40.00
36105 Piper, Margaret  999999991      00001      80.00
36106 Goncalves, Jose  270065655      00001      86.67
                                           999999991      00100
36107 Nguyen, Thien  270065655      00001      86.67
                                           999999991      00100
36108 Brown, Tanya  270065655      00001      86.67
                                           999999991      00100
36109 Robert, Chan  270065655      00001      80.00
                                           999999991      00100
36110 Gregory, Harmon  999999991      00001      86.67
                                           00007
36111 Jacques, Tremblay  999999991      00001      86.67
                                           00007
36112 Stephen, Trunks  999999991      00001 160.00 156.00
                                           00007
36113 David, Bailey J.  999999991      00001      40.00
                                           00007
36114 Melissa, Reed  270065655      00007 176.00
                                           999999991      00001 160.00 156.00
36115 Janie, Hagerty  270065655      00100 176.00 160.00 156.00 176.00 168.00 176.00 184.00
    
```

3.3.5 Setting Processing Options for Hours Worked by Month Build (P08524)

See [Section 7.24, "Hours Worked by Month Build \(P08524\)"](#)

3.3.6 Adding or Updating Hours Worked by Month Records

Navigation

From Human Resources (G08), choose Affordable Care Act

From Affordable Care Act (G08ACA), enter 29

From ACA Information Returns Setup (G08ACA41), select Hours Worked by Month Inquiry

1. In the Hours Worked by Month Inquiry (P08224), complete the following fields:

Field	Description
Reporting Year	The calendar year for which the ACA Health Coverage Information Return is being produced.

Field	Description
Employer Tax ID	<p>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.</p> <p>This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.</p> <p>Note: Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.</p>
Home Company	<p>The company number where the employee records generally reside.</p>
Months - Jan to Dec	<p>The total hours an employee worked in a specified month. This value accumulates in the Employee Transaction History hours worked based on date worked.</p>

Setting Up ACA Information Returns Workfiles

This chapter contains the following topics:

- [Section 4.1, "Understanding the ACA Information Returns Workbench"](#)
- [Section 4.2, "Understanding the AIR Year-End Workfiles"](#)
- [Section 4.3, "Setting Up AIR Year-End Workfile Parameters"](#)
- [Section 4.4, "Creating the AIR Year-End Workfiles"](#)
- [Section 4.5, "Reset Form 1095-C"](#)

4.1 Understanding the ACA Information Returns Workbench

ACA Information Returns Workbench (P08210WB) is a central location where you can set up parameters and versions and run various processes for AIR reporting. The workbench simplifies the process of working with AIR reporting and its associated information.

Perform the following procedures:

- Create the 1095-C Offer and Coverage workfile.
- Create the 1095-C Covered Individuals file (if you have self-insured plans).
- Print Form 1095-C for recipients.
- Reset Form 1095-C workfiles (if necessary).
- Run the 1094-C Employee Counts
- Review and edit 1095-C workfile data records by using the 1095-C Offer and Coverage Revisions (P08119).

See [Section 5.2, "Working with AIR Year-End Workfiles Information"](#).

- Track the status of processes related to producing Health Coverage Information Returns. Manage processes and their status, including running preliminary reports, submitting workfile build processes, printing forms, and resetting any status for reprocessing.

4.2 Understanding the AIR Year-End Workfiles

After you have completed the base setup and generated all the preliminary builds, 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 workfile to create all the data for producing Form 1095-C. Once you have created the workfiles you can review and edit the data prior to printing forms or doing electronic filing.

The 1094-C Transmittal Workfile may have records which you enter manually, and might have additional records generated by the 1094-C Employee Counts batch process.

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, Union/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 the 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. Therefore, a single Form 1095-C is filed for the calendar year for that employee which 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 (ALE Member), 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 an AIR year-end workfile, you must:

1. Create an AIR ID.
2. Set AIR parameters.
3. Create batch versions for the reports that you are processing.
4. Set processing options for 1095-C Offer and Coverage Workfile Build (P08119).
See [Section 4.4.4, "Setting Processing Options for the 1095-C Offer and Coverage Information Build \(P08519\)"](#).
5. Set processing options for 1095-C Covered Individuals File Build (P08520).
If you have self-insured plans, you run the 1095-C Covered Individuals report in Part III.
6. Set processing options for 1094-C Employee Counts batch process (P08522).

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

4.2.1 Understanding the AIR Year-End Workfile Definitions

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

- The AIR ID that identifies 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 file them electronically.

The first step to creating 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, if you 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.

4.2.2 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. AIR IDs are stored in the ACA Information Returns Control file (F08210). 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 all ALE Members or to process individual ALE Members. An AIR ID provides you with a way to group your data for easier processing and review. Later, when preparing electronic filing with the IRS, an AIR ID provides the employee groups for preparing submissions.

When you submit the 1095-C workfile build process for an AIR ID, records are created in the workfiles (1095-C Offer and Coverage Information table - F08119 and 1095-C Covered Individuals table - F08120) according to the AIR ID and the year being processed.

To run an AIR ID process again, you must first reset the AIR ID process from the Information Returns Workbench (P08210WB). The tables are then repopulated with updated information from the workfile build.

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, if you reset the AIR ID.

The Offer and Coverage and Covered Individuals tables include a Protected Record field. This field allows you to indicate that a record is protected and should not be affected by any subsequent reset or submit processes. When you reset an AIR ID version, you can choose to 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.

4.2.3 Set AIR Parameters

Once you have created an AIR ID and set up processing parameters, you need to set certain AIR statuses manually. These statuses are set to complete 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

4.3 Setting Up AIR Year-End Workfile Parameters

This section discusses how to:

- Create an AIR ID/Version.
- Set AIR processing parameters.

4.3.1 Creating an AIR ID

Navigation

From Human Resources (G08), choose Affordable Care Act

From Affordable Care Act (G08ACA), select ACA Information Returns

From ACA Information Returns (G08AIR), select Information Returns Workbench

Field	Description
AIR ID	Enter an alphanumeric value similar to a Payroll ID or a W-2 ID, which identifies a customer-defined set of AIR records within one reporting year.
Reporting Year	Enter the calendar year for which Form 1095-C is being produced.
Transmission Type	Enter a value identifying the type of ACA transmission to the IRS. Values are: <ul style="list-style-type: none"> ■ O - A transmission containing original Form 1095-C records. ■ C - A transmission containing correction Form 1095-C records.
AIR ID Corrected	When you are creating an AIR ID for correction forms, enter the AIR ID for the original AIR ID that is being corrected.

Field	Description
Hours of Service Process	Enter a value that indicates the current status of the Hours of Service process for the ACA Information Returns (AIR) cycle. Valid values are: Blank: Not executed for AIR ID 1: Completed
Periods of Employment Build	Enter a value that indicates the current status of the Periods of Employment build process for the AIR cycle. Valid values are: Blank: Not executed for AIR ID 1: Completed
Hours Worked by Month Build	Enter a value that indicates the current status of the Hours Worked by Month process for the AIR cycle. Valid values are: Blank: Not executed for AIR ID 1: Completed
Build 1095-C Offer of Coverage	Enter the batch version used to process the 1095-C Offer And Coverage Workfile Build (P08519). This version identifies a specific set of data selection and sequencing settings used to process the 1095-C Offer And Coverage Workfile Build (P08519). When you run the Offer and Coverage Workfile Build, the Process Flag and date run are populated automatically.
Build 1095-C Covered Individuals	Enter the batch version used to process the 1095-C Covered Individuals File Build (P08520) report. This version identifies a specific set of data selection and sequencing settings used to process the 1095-C Covered Individuals File Build (P08520) report. When you run the 1095-C Covered Individuals Workfile Build from the AIR Information Returns Workbench, the date when the build is run is populated automatically.
Print Form 1095-C	Enter the batch version used to process the Print Form 1095-C. This version identifies a specific set of data selection and sequencing settings for the batch version used to process the Print Form 1095-C. When you run the print from the Health Coverage Information Returns Workbench, the Process Flag and Date Printed are populated automatically.
Build Form 1094-C	When you run the Form 1094-C Build, the Process Flag and Build Date are populated automatically.
Reset Form 1095-C	Enter the batch version to use when running Form 1095-C reset process.

4.3.2 Reviewing ACA Information Returns Status

You can review the status of an AIR ID from the Information Returns Workbench. You must enter the Reporting Year and the AIR ID you want to review to set the display at a particular AIR ID.

You can review status information about each step in the workfile build at any time during the workfile build process. This information helps you 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 manually to indicate that the step has been completed. Other steps should only be updated by submit or reset processing.

Field	Description
ACA Eligibility Hours of Service Process	<p>The status indicates that you have completed the setup in the ACA Employee Eligibility table. The information is used to determine an employee's full-time or not-full-time status for each month of the reporting year. The ACA Employee Eligibility records can be entered through ACA Employee Eligibility or created by the Hours of Service report. Values are:</p> <ul style="list-style-type: none"> ■ Blank: Not executed for AIR ID ■ 1: Completed
Periods of Employment Build	<p>The value indicates the current status of the Periods of Employment build process for this AIR cycle. Values are:</p> <ul style="list-style-type: none"> ■ Blank: Not executed for AIR ID ■ 1: Completed
Hours Worked by Month Build	<p>The value indicates the current status of the Hours Worked by Month process for this AIR cycle. Values are:</p> <ul style="list-style-type: none"> ■ Blank: Not executed for AIR ID ■ 1: Completed
AIR ID Corrected	<p>AIR IDs for corrected forms show the original AIR ID being corrected.</p>
Build Form 1095-C	<p>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. Values are:</p> <ul style="list-style-type: none"> ■ Blank: Not executed for AIR ID ■ A: Active, or in the job queue ■ 1: Completed
Print Form 1095-C	<p>The status in this field is automatically updated to A when a version of Form 1095-C is submitted and is updated to 1 when the print completes. This status is also updated when a reset is performed. Values are:</p> <ul style="list-style-type: none"> ■ Blank - Not executed for AIR ID ■ A - Active, or in the job queue ■ 1 - Completed
Build Form 1094-C	<p>The status in this field is automatically updated to A when a version of Form 1094-C Employee Counts is submitted and is updated to 1 when the build completes. Values are:</p> <ul style="list-style-type: none"> ■ Blank - Not executed for AIR ID ■ A - Active, or in the job queue ■ 1 - Completed

4.4 Creating the AIR Year-End Workfiles

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

- Create the AIR Offer and Coverage Workfile
- Create the Covered Individuals Workfile
- Create the 1094-C Transmittal Workfile Employee Counts
- Set processing options for the Offer and Coverage Workfile Build (P08519)

- Set processing options for the Covered individuals Build (P08520)
- Set processing options for the 1094-C Employee Counts (P08522)
- Set processing options for the Offer and Coverage Information report (P08419)
- Set processing options for the 1095-C Covered Individuals report (P08420)

4.4.1 Understanding the AIR Year-End Workfile Creation

After setting the processing options for P08519, P08520 (optional) and AIR Parameters, you create the AIR Offer and Coverage workfile and optionally the Covered individuals workfile.

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

- 1095-C Offer and Coverage Workfile Build report - R08519EX
- 1095-C Covered Individuals Report - R08420 (Optional)

The 1095-C Offer and Coverage Workfile Build (P08519) creates records in the F08119 table. Optionally, the 1095-C Covered Individuals Build (P08520) is run to create records in the F08120 table.

The 1095-C Covered Individuals Build program (P08520) creates records in the F08120 table. The 1095-C Covered Individuals report (R08420) details the dependents of the employee, the tax ID, the relationship of the dependent to the employee, the self-insured medical plan under which the dependent is covered, and months in the year for which the dependent is covered.

The 1095-C Offer and Coverage Report (R08419) report is run from the reports menu G08ACAR. The Offer and Coverage Workfile report (R08419) reports information from the F08119 and F08120 tables that are 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. Detail records are used only for audit purpose.

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

After you process the workfile build, review the records using the 1095-C Offer and Coverage Inquiry (P08119) and make any necessary changes before you begin printing Form 1095-C.

4.4.2 Before you begin

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

See [Section 4.3.1, "Creating an AIR ID"](#) and [Section 4.3.2, "Reviewing ACA Information Returns Status"](#).

4.4.3 Creating the 1095-C Covered Individuals File Build (P08520)

Navigation

From Human Resources (G08), choose Affordable Care Act

From Affordable Care Act (G08ACA), select ACA Information Returns

From ACA Information Returns (G08AIR), select 1095-C Covered Individual Build

The 1095-C Covered Individuals report can be run standalone (P08420) or automatically by setting the processing option in the 1095-C Covered Individuals Build (P08520).

Note: If you run the 1095-C Covered Individuals File Build from the menu, you must first run the 1095-C Offer and Coverage Workfile Build (P08519).

4.4.4 Setting Processing Options for the 1095-C Offer and Coverage Information Build (P08519)

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

See [Section 7.19, "1095-C Offer and Coverage Report \(P08519\)"](#)

4.4.5 Sample 1095-C Offer and Coverage Build

Figure 4–1 1095-C Offer and Coverage Build

```

08419                                     Oracle
                                           Offer & Coverage Information Report

Employee:  36100 Aca, Al                      Date Started:  01/01/01
SSN:      XXX-XX-6454                        Date Terminated:

Reporting Year: 2015                          Reporting CO:  00001
Employer Tax ID: 999999991                    AIR Control No.: 383

Effective Effective Self Corr Corr   AIR   All 12
From   Thru   Covr  Flag No.   ID     Months   Jan   Feb   Mar   Apr   May   Jun   Jul   Aug
-----
01/01/15 12/31/15  X           555    14 1A
                                     15
                                     16 2C

Covered Individual's          Social Security   Date of   Line Corr Corr Prot
Name                          Number           Birth    No. Flag No.  Flag Rel
-----
Al Aca                        XXX-XX-6454      1.0           E Employee
Nancy McMillan                XXX-XX-1238      2.0           S Spouse
Patrick McMillan              XXX-XX-1238      3.0           C Child
    
```

4.4.6 Setting Processing Options for the 1095-C Covered Individuals Build (P08520)

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

See [Section 7.22, "Build 1095-C Covered Individuals \(P08520\)"](#)

4.4.7 Setting Processing Options and Data Selection for the 1095-C Covered Individuals Report (P08420)

The 1095-C Covered Individuals report can be run as part of the build process, if a version is specified in the processing options for the build job. It can also be run independently from the build from the reports menu (G08ACAR).

The 1095-C Covered Individuals report (P08420) prints the information created during the 1095-C Covered Individuals Build (P08520).

Note: The data selection for the report must be setup the same as the data selection for the build in order to see only the records created during the build. This is because the report can be run independently from the build.

4.4.8 Sample 1095-C Covered Individuals Report

Figure 4–2 1095-C Covered Individuals Report

Employee	Home Co	R Line	F Cor	P Num	Rev AIR ID	Covered Sts R	Covered Ind	Covered Individual Name	Tax ID	Date of Birth	Plan ID	Opt	Date Eff	Ending Eff	All Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
77300	00100	1	1.0		WGH0001	E	77300	Larry T. Rowe	456-32-7974	11/29/60			11/01/15	12/31/15												X	X
		1	1.0		WGH0001	E	77300	Larry T. Rowe	456-32-7974	11/29/60	ACA2	E	11/09/15	12/31/15												X	X
		2	1.0		WGH0001	E	77300	Larry T. Rowe	456-32-7974				11/01/15	12/31/15												X	X
77731	00001	1	1.0		WGH0001	E	77731	George M. Rutledge	989-78-4554	04/01/75			01/01/15	04/05/15	X												
		1	1.0		WGH0001	E	77731	George M. Rutledge	989-78-4554	04/01/75	ACA2	E	01/01/15	04/05/15	X												
		1	1.0		WGH0001	E	77731	George M. Rutledge	989-78-4554	04/01/75	ACA2	B	04/06/15	12/31/15	X												
		2	1.0		WGH0001	E	77731	George M. Rutledge	989-78-4554				01/01/15	12/31/15	X												
		1	2.0		WGH0001	S	7773101	Bernice L. Rutledge	007-77-3101	12/20/76	ACA2	B	04/06/15				X	X	X	X	X	X	X	X	X	X	X
		2	2.0		WGH0001	S	7773101	Bernice L. Rutledge	007-77-3101				04/06/15				X	X	X	X	X	X	X	X	X	X	X
77741	00100	1	1.0		WGH0001	E	77741	Elizabeth G. Heritage	465-78-5715	11/29/60			01/01/15	12/31/15	X												
		2	1.0		WGH0001	E	77741	Elizabeth G. Heritage	465-78-5715				01/01/15	12/31/15	X												
		1	2.0		WGH0001	S	7774101	Michael V. Heritage	007-77-4101	10/23/50			007-77-4101														
		2	2.0		WGH0001	S	7774101	Michael V. Heritage	007-77-4101				007-77-4101														
77744	00100	1	1.0		WGH0001	E	77744	Stephanie U. Sakach	654-68-5715	03/01/60	ACA2	A	01/01/15	06/11/15													
		1	1.0		WGH0001	E	77744	Stephanie U. Sakach	654-68-5715	03/01/60			06/01/15	12/31/15							X	X	X	X	X	X	X
		1	1.0		WGH0001	E	77744	Stephanie U. Sakach	654-68-5715	03/01/60	ACA2	E	06/12/15	12/31/15							X	X	X	X	X	X	X
		2	1.0		WGH0001	E	77744	Stephanie U. Sakach	654-68-5715				01/01/15	12/31/15							X	X	X	X	X	X	X

4.4.9 Creating or Updating 1094-C Transmittal Inquiry

The 1094-C Transmittal program (P08221) provides information about the ALE Members. The records displayed are from the ALE Member Information file (F08121).

Navigation

From ACA Information Returns (G08AIR), select 1094-C Transmittal Inquiry

Field	Description
Reporting Year	Enter the calendar year for which the ACA Health Coverage Information Return is being produced.
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.

Field	Description
Employer Tax Identification	<p>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.</p> <p>This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.</p> <p>Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.</p>
Reporting Company	<p>The company under which the Forms 1094-C or 1095-C is reported. The reporting company is used to obtain the name and address information for the Federal Employer Identification Number (FEIN). This is equivalent to an Employer Tax ID, ALE Member of an aggregated ALE group, or an ALE if the ALE contains a single member.</p>
Large Employer ALE	<p>A user-defined value (08/MI) that is used to identify the member of a business entity that employs 50 or more full-time employees (FTE).</p>
Total Forms Transmittal	<p>The total number for Forms 1095-C submitted with the associated Form 1094-C transmittal.</p>
Total Forms ALE Member	<p>The total number of Forms 1095-C filed by and/or on behalf of the ALE member.</p>
Corrected	<p>A value to indicate if the 1095-C form has been corrected.</p> <ul style="list-style-type: none"> ▪ Blank: The form has not been corrected. ▪ X: The form has been corrected.
Authoritative Transmittal	<p>A value to indicate whether or not the 1094-C is the authoritative transmittal for the ALE Member.</p> <ul style="list-style-type: none"> ▪ 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

4.4.10 Setting Processing Options for Form 1094-C Employee Counts (P08522)

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

Navigation

From **ACA Information Returns (G08AIR)**, select **1094-C Employee Counts**

See [Section 7.23, "1094-C Monthly Count Batch Program \(Proof or Final\) \(P08522\)"](#)

4.4.11 Sample 1094-C Employee Counts Report

Figure 4-3 1094-C Employee Counts Report

08522		Oracle - JD Edwards ALE Member Monthly Count		Page - 3 Date/Time - 3/21/16 / 2:59:02 Reporting Year - 2015											
** FINAL **															
Address Number	Employer Tax ID / Employee Name		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Error Description
701	Canadian Payroll Year-End Comp	EE													No Hours Worked for Employee This Year
710	Donato710, Meghan	FTE													No Hours Worked for Employee This Year
711	Anderson711, Frank G.	FTE													No Hours Worked for Employee This Year
712	Barka712, Mohammed	FTE													No Hours Worked for Employee This Year
713	Schloneger713, Claudette J.	FTE													No Hours Worked for Employee This Year
714	Collins714, Karen M.	FTE													No Hours Worked for Employee This Year
715	Camp715, Ursula	FTE													No Hours Worked for Employee This Year
716	Stults716, Elizabeth A.	FTE													No Hours Worked for Employee This Year
717	Engram717, Lisa L.	FTE													No Hours Worked for Employee This Year
720	Donato720, Meghan	FTE													No Hours Worked for Employee This Year
721	Anderson721, Frank G.	FTE													No Hours Worked for Employee This Year
722	Barka722, Mohammed	FTE													No Hours Worked for Employee This Year

4.5 Reset 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. For 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, rebuild, and reprint them.

You can reset and reprint AIR year-end forms for an entire version.

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

For more information, see [Section 7.20, "Reset Form 1095-C Information \(P085191\)"](#)

Reviewing ACA Information Returns (AIR) Workfile Information

This chapter contains the following topics:

- [Section 5.1, "Reviewing the AIR Year-End Workfiles"](#)
- [Section 5.2, "Working with AIR Year-End Workfiles Information"](#)
- [Section 5.3, "Working with Form 1094-C Workfile Information"](#)
- [Section 5.4, "Understanding the 1094-C Work Tables"](#)

5.1 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 to the year-end forms (Form 1095-C). To re-create the workfile, you run the reset process for the affected AIR ID, then re-run the build process.

There are five AIR year-end workfiles:

- F08119 - 1095-C Offer and Coverage
- F08120 - 1095-C Covered Individuals
- F08121 - 1094-C Transmittal
- F08122 - 1094-C ALE Monthly Information
- F08123 - 1094-C Other ALE Members

You can also edit records created by the workfile build process, manually create new records, or delete records in the workfile using the Form 1095-C Offer and Coverage Revisions (P08119) or the Form 1095-C Covered Individuals Revisions (P08120). You can add, edit, or delete 1094-C information from the 1094-C Transmittal Revisions (P08121).

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.

5.1.1 Understanding the AIR Year-End Workfiles Information

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

From Form 1095-C Information, you can access data from the 1095-C Offer and Coverage file (F08119) and the 1095-C Covered Individuals (F08520) file. The 1095-C Offer and Coverage inquiry (P08219) and the 1095-C Covered Individuals inquiry (P08220) display data in a format similar to the paper Form 1095-C.

5.2 Working with AIR Year-End Workfiles Information

This section provides an overview of the Form 1095-C Offer and Coverage program and discusses how to use the program 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.

5.2.1 Understanding Form 1095-C Information

You use the Form 1095-C Offer and Coverage Revisions (P08119) to inquire on data in the 1095-C Offer and Coverage workfiles and the 1095-C Covered Individuals workfiles, 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 non-employee, you must create an Address Book record to identify the recipient. When creating a record by using the Form 1095-C Offer and Coverage program, the following information is mandatory:

- AIR ID
 - Employee Number
 - Tax ID
 - Reporting Year
 - Offer of Coverage Code, whether in the All 12 Months field or each month individually
-
-

When you run the Form 1095-C Offer and Coverage program, the system retrieves AIR year-end workfiles information from the F08119 and F08520 files. If you make any changes to the information, the system updates these two files.

The Form 1095-C Offer and Coverage Inquiry program (P08219) initially displays records according to the filters set up in the processing options. For summary records, a selection option is available to go to the detail screen, where the record can be edited or deleted or new records can be added. On the Offer and Coverage Revisions program (P08119) an option exit is available to go to the Covered Individuals Inquiry

(P08220) and Covered Individuals Revisions (P08120). The header and Part II information in the Offer and Coverage inquiry form are retrieved from the F08119 file and Covered Individuals Part III information is retrieved from the F08120 file.

When you add a record to a workfile, 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 must 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 file and uses the same control number for the record in the F08120 file. Therefore, if you want to import a record into the workfile, ensure that you first import the data for the 1095-C Offer and Coverage file (F08119) followed by the data for the 1095-C Covered Individuals file (F08120).

When you delete a record from the 1095-C Offer and Coverage file (F08119), the corresponding record is deleted from the 1095-C Covered Individuals file (F08120). Also, when you delete a summary record, the corresponding detail records are also deleted.

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.

From the Form 1095-C Offer and Coverage Inquiry program (P08219), you can go to the following forms:

- Covered Individuals Inquiry (P08220)
- Offer and Coverage Revisions (P08119)
- Offer of Coverage Additional Information Window (P082191)
- Audit Information Window (P0045)

5.2.2 Understanding 1095-C Covered Individuals Report (P08420)

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) and their family members who have enrolled 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 P08520 process build.

You can specify to run the Covered Individuals report (P08420) from the build process automatically by setting the processing option in the Covered Individuals build (P08520) or you can run it standalone after running the workfile build from the ACA Reports menu. You can run the Covered Individuals report (P08420) to review information contained in the Covered Individuals workfile (F08120). On running P08520, the system retrieves information from the participant file (F08901) and the Dependent/Beneficiary Cross-Reference file (F08336) and updates the records in the 1095-C Covered Individuals file (F08120). This file contains the Detail records by Home Company and Summary records by Tax ID, for each employee and their dependents. The Covered Individuals file provides information for reporting covered individuals in Part III of Form 1095-C and can be managed from the 1095-C Covered individual Inquiry (P08220).

You can also import data from a third-party administrator or other source into the workfile by using the Covered Individuals Batch Import program (P08120Z).

5.2.3 Adding or Updating 1095-C Information

Navigation

From Human Resources (G08), choose Affordable Care Act

From Affordable Care Act (G08ACA), enter 29

From ACA Information Returns Setup (G08ACA41), select 1095-C Offer and Coverage

Field	Description
Reporting Year	Enter the calendar year for which Form 1095-C is being produced.
Corrected	If a record is corrected, the system displays Corrected Record on the line below the Correction Number field.
Tax ID	<p>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.</p> <p>This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.</p> <p>Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.</p>
Reporting Company	The company under which Forms 1094-C or 1095-C will be reported. The Reporting Company is 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.
AIR ID	An alphanumeric value similar to a Payroll ID or a W-2 ID, which identifies a customer-defined set of AIR records within one reporting year.
Review Status	A user-defined code (08/RV) that allows the user to flag records that might or might not need further review.
Self-Insured Flag	<p>A flag to indicate whether the employer offers employer-sponsored self-insured health coverage in which the employee or other individuals are enrolled.</p> <p>Blank: The employer does not provide self-insured coverage.</p> <p>X: The employer does provide self-insured coverage.</p>
Protected Record	<p>A flag to indicate that a record has been manually modified and that the subsequent batch processes should not change the existing record.</p> <p>0 or Blank: The record has not been manually modified.</p> <p>1: The record has been manually modified and subsequent batch processes must not update it.</p>
1095-C Void Flag	<p>A flag to indicate if Form 1095-C has been voided.</p> <p>Blank: The form has not been voided.</p> <p>X: The form has been voided.</p> <p>Note: The IRS has not implemented this flag for the 2019 reporting year.</p>

Field	Description
Offer of Coverage	<p>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.</p> <p>If the code applies to 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.</p>
Monthly Premium	<p>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.</p> <p>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. The monthly premium amount is only applicable when the Offer of Coverage Code is 1B, 1C, 1D or 1E.</p>
Safe Harbour	<p>The IRS-defined Code Series 2 indicator to report that one of the following situations applied to the employee:</p> <ul style="list-style-type: none"> ■ 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 multi-employer interim rule relief. <p>If the safe harbor code applies to 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.</p>
AIR Control Number	This field is a unique number that identifies Form 1095-C.
Record Origination	<p>A code to indicate the source of a 1095-C Offer and Coverage record.</p> <p>C: Indicates that the record was computer generated during the 1095-C Offer and Coverage Workfile Build process.</p> <p>M: Indicates that the record was manually entered or imported into the Form 1095-C Information program (P08119).</p>

5.2.4 Importing 1095-C Offer and Coverage and Covered Individuals Information

Access the forms to import offer and coverage as well as covered individuals details for a record from the G08ACAZ menu.

- 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

5.2.4.1 Importing to 1095-C Offer and Coverage File (F08119)

When importing records to the 1095C Offer and Coverage file (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 file key, and the address book record is used for entering Form 1095-C Part I name and address information.

5.2.4.2 Importing to 1095-C Covered Individuals File (F08120)

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

When importing covered individuals from an external source, those covered individuals do not require an Address Book number (PAN8) in the JD Edwards Address Book. This field can be left blank. If you leave PAN8 blank, you must supply the covered individual's First Name, Middle Initial and Last Name and either the individuals Social Security Number (SSN) or Date of Birth.

5.3 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

5.3.1 Understanding the 1094-C Transmittal

The ALE Member Information Revisions program is used to enter and maintain ALE Member Information records for the Affordable Care Act. The data resides in the ALE Member Information file (F08121).

There are two different ways to enter ALE Member information records into this file. One is automatic, when the 1094-C Employee Counts build process is run, data is transmitted to the government, the file will be automatically updated. The other is through the interactive program.

You may view both Authoritative and Non-Authoritative Transmittal 1094-Cs through this program. You may add, change, or delete Authoritative Transmittal records. You may change or delete 1094-C Non-Authoritative Transmittal records.

5.3.2 Record Types

There are two types of records in the file. The Authoritative Transmittal records contain ALE Member information such as, company and designated Government Entity contact information, form counts for the ALE Member, Certificates of Eligibility, monthly employee counts, and so on. The other are non-authoritative transmittals which contain ALE Member contact information and the number of Forms 1095-C associated with that transmittal.

You may only have one Authoritative Transmittal record with the ALE information for each Reporting Year, Employer Tax ID, and Line ID. You may have as many non-Authoritative Transmittal records as there are combinations of Reporting Year, Employer Tax ID, AIR ID, and Line ID.

5.3.3 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.

5.3.4 Updating the 1094-C Transmittal Program (P08121)

You can add, change, or delete Authoritative Transmittal 1094-C records for the Affordable Care Act through the 1094-C Transmittal Inquiry program (P08121). You may view non-authoritative transmittal records and update fields from Part 1 of the Form 1094-C. Non-authoritative transmittal 1094-C records are added automatically by the Employee Counts build program (P08522).

5.3.4.1 Deleting Records

You are able to delete the Authoritative Transmittal records under certain circumstances:

- If Form 1094-C has not been submitted and accepted by the IRS.
- If the record is not a correction record.

5.3.4.2 Correction Records

If the AIR ID is not submitted to the IRS, changes made to the forms update the original records. Once the AIR ID is submitted, the original record is marked as corrected with a value X in the Corrected field (ARCC). A new record is created with the requested changes, the Record Line Number (RCK5) is incremented by 1, and the correction AIR ID for the original AIR ID is assigned. The original record is referred while submitting the correction record to the IRS.

5.3.5 Setting Up the 1094-C Transmittal

Navigation

From Human Resources (G08), choose **Affordable Care Act**

From **Affordable Care Act (G08ACA)**, enter **29**

From **ACA Information Returns Setup (G08ACA41)**, select **1094-C Transmittal**

Field	Description
Reporting Year	Enter the calendar year for which the ACA Health Coverage Information Return is being produced.
Corrected	If a record is corrected, the system displays Corrected Record on the line below the Correction Number field.

Field	Description
Tax ID	<p>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.</p> <p>This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.</p> <p>Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.</p>
Reporting Company	The company under which Forms 1094-C or 1095-C will be reported. The Reporting Company is 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.
AIR ID	An alphanumeric value similar to a Payroll ID or a W-2 ID, which identifies a customer-defined set of AIR records within one reporting year.
Large Employer ALE	A user-defined code (08/MI) that is used to identify the member of a business entity that employes 50 or more full-time equivalent employees. Applicable Large Employer (ALEM) ID is used with processes related to the ACA.
Government Entity	<p>Enter the Address Book number of the Designated Government Entity (DGE) that is part of or related to the Governmental Unit.</p> <p>Government employers can designate a sister agency as the go-to company for all returns related compliance requirements.</p> <p>Note: You can skip Line 9 through 16, of Form 1094-C, if you are not a government employer.</p>
DGE Contact	Enter the Address Book number of the contact for the Designated Government Entity (DGE).
Total Forms Submitted with this Transmittal	<p>The total number for Forms 1095-C submitted with the associated Form 1094-C transmittal.</p> <p>This number is counted automatically by the system.</p>
Total Forms for ALE Member	<p>The total number of Forms 1095-C filed by and/or on behalf of the ALE member.</p> <p>This number is counted automatically by the system.</p>
Aggregated ALE Group Flag	<p>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.</p> <ul style="list-style-type: none"> ■ 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.
Certificates of Eligibility	<p>A flag to indicate whether or not the Certification of Eligibility applies.</p> <ul style="list-style-type: none"> ■ Blank: The Certification of Eligibility does not apply. ■ X: The Certification of Eligibility applies. <p>Note: From the Reporting Year 2016, you cannot enter any value in the field B (Qualifying Offer Method Transaction Relief flag).</p>

Field	Description
Signature	A field to indicate who is electronically signing the government form.
Date Signed	Enter the date on which the form is signed.
Contact Title	The format title or position associated with this contact.

5.3.6 Understanding the 1094-C Other Aggregated Groups

The Other Aggregate ALE Members program (P08123) allows you to enter additional ALE members per Reporting Year, Employer Tax ID, and Effective Date. The data resides in the Other Aggregate ALE Member file (F08123).

These records include the average number of full-time employees within each ALE member record, per year and employer tax ID. The system will automatically count this number.

5.3.7 Updating the 1094-C Other Aggregated Groups

You can add, change, or delete the records in the file.

The ALE Members entered must exist in the ALE to Home Company X-Ref file (F08116) and be active for the reporting year associated with the record you are entering.

There is an exit to view the audit information for each record.

5.4 Understanding the 1094-C Work Tables

This section provides an overview of the 1094-C Transmittal, 1094-C Other ALE Members, and discusses how to set up the 1094-C information.

5.4.1 Importing or Exporting the 1094-C Other Aggregated Groups

You can export records displayed on the screen to an export file on the Integrated File System (IFS), and import records from a file on the IFS to the screen.

To export records, enter a value T in the Action Code to display the Interactive Export Parameters (P00SFDLP).

To import records, enter a value F in the Action Code to display the Interactive Import Parameters (P00IULP).

For more information about the Import or Export section, see the *JD Edwards World Technical Foundation Guide* for more information.

5.4.2 Setting Up the 1094-C Other Aggregated Groups Program (P08123)

Navigation

From Human Resources (G08), choose Affordable Care Act

From Affordable Care Act (G08ACA), enter 29

From ACA Information Returns Setup (G08ACA41), select 1094-C Other ALE Members

Field	Description
Reporting Year	Enter the calendar year for which the ACA Health Coverage Information Return is being produced.
ALE ID	A user-defined code (08/LE) that is used to identify a business entity that employs 50 or more full-time equivalent employees. Applicable Large Employer (ALE) is used with processes related to the ACA.
Employer Tax Identification	<p>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.</p> <p>This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.</p> <p>Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.</p>
Average Monthly FTE Count	<p>The average monthly number of full-time employees for an ALE Member that is part of an Aggregated ALE Group.</p> <p>The system calculates this number automatically.</p>
ACA Protected Record Flag	<p>A flag to indicate that a record has been manually modified and subsequent batch processes should not change the existing record. Values are:</p> <ul style="list-style-type: none"> ■ 0 or Blank - The record has not been manually modified. ■ 1: The record has been manually modified and subsequent batch processes should not update it.

Producing AIR Year-End Deliverables

This chapter contains the following topics:

- [Section 6.1, "Understanding the AIR Year-End Reporting Process"](#)
- [Section 6.2, "Printing 1095-C Reports"](#)
- [Section 6.3, "Making Corrections Prior to Filing with the IRS"](#)
- [Section 6.4, "Creating and Reviewing Submitted or Transmitted Form 1094-C"](#)
- [Section 6.5, "Replacement Process"](#)
- [Section 6.6, "Transmitting Replacements"](#)
- [Section 6.7, "Understanding Corrected Forms 1094-C and 1095-C"](#)

6.1 Understanding the AIR Year-End Reporting Process

After you review the Affordable Care Act Health Coverage Information Returns (AIR) workfiles (Form 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 (AIR system)
- Replacing rejected transmissions
- Correcting accepted transmissions to fix errors reported by the IRS or employer and submitting the corrections

Form 1095-C must be distributed to employees by January 31 following the reporting year. Electronic filing of Forms 1094-C and 1095-C must be submitted to the IRS by March 31 of the year following the reporting year. If corrections are made to an employee's Form 1095-C after distribution, a corrected Form 1095-C must be issued to the employee. If the correction is made after the form has been electronically filed and accepted by the IRS, an electronic correction must also be filed with the IRS.

Form 1095-C must 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 must receive a Form 1095-C, regardless of full-time status. Each ALE Member must print only one Form 1095-C for each recipient.

JD Edwards supports printing Form 1095-C for distribution to recipients (usually employees). 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.

JD Edwards supports electronic filing of Forms 1094-C or 1095-C with the IRS using the ACA Information Returns (AIR) system UI Channel. This involves producing one or more XML Form Data files and transmitting to the IRS through the AIR System Web Portal. Each Form Data file contains 1094-C and 1095-C information, and is accompanied by a separate XML Manifest file.

6.1.1 Form 1095-C

The JD Edwards World system supports printing 1095-C for employees or recipients using a 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 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 receives a Form 1095-C from each employer.

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 on Line 14 in Part II of the form.

6.1.2 1094-C Authoritative Transmittal Form

Form 1094-C is a cover sheet that must accompany Forms 1095-Cs 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.

6.2 Printing 1095-C Reports

This section provides an overview of AIR year-end forms, lists prerequisites, and discusses how to print Form 1095-C.

6.2.1 Before you Begin

Before you print Form 1095-C, complete the following tasks:

- Process the 1095-C Offer and Coverage workfile build and optionally the 1095-C Covered Individuals workfile build.
 - Review and validate the data generated by the workfile build processes.
 - Ensure that you have specified the Print Form 1095-C version in the processing parameters set up to use for printing.
 - Test print to verify that the data is correct and verify form alignment.
 - Ensure that the alias fields in the Data Dictionary match the RTF template.
- For more information, see [Section B.1, "Understanding the Sources for Forms 1095-C and 1094-C and 1095-C XML"](#)

6.2.2 Printing Form 1095-C from the Workbench

Navigation

From Human Resources (G08), choose **Affordable Care Act**

From **Affordable Care Act (G08ACA)**, select **ACA Information Returns**

From **ACA Information Returns (G08AIR)**, select **Information Returns Workbench**

1. Create an IFS folder.

For more information, see *JD Edwards World Technical Tools Guide*.

2. Copy the BI Publisher template (*1095-C_PDF.rtf*) from the Software Update to the new IFS folder.

3. Setup Electronic Document Delivery (EDD).

For more information, see Set Up EDD in *JD Edwards World Technical Tools Guide*.

- Set up a PDF Profile. (G00E, option 6)

PDF Profiles includes the data that controls the security settings and output properties for a PDF file that you create through EDD.

- Setup a Transformation Template (G00E, option 5).

You define transformation templates to translate XML output from Import/Export using an XSL or BI Publisher (BIP) template. You use an XSL template to transform an XML document from one form to another. You use a BIP template with XML input data to create an output report in various formats. Before you complete the Template File field in the transformation template, you must create the template file. For the 1095-C Print process, the BIP template is already created (*1095-C_PDF.rtf*) and is included in the Software Update.

- Set up a Distribution Profile (G00E,m option 3).

You set up a distribution profile to define how to distribute a document and the individuals that receive the document. You can select a method for distribution, such as, print or e-mail.

Note: Form 1095-C output is not set up to burst individual forms in separate PDF files and is not suitable to e-mail Form 1095-C to employees. However, you may e-mail Form 1095-C PDF output to yourself as a convenience.

- Setup the Batch Export Parameters on the Form 1095-C DREAMWriter version(s) for the Form 1095-C Print program (P085192).
- 4. Build the 1095-C Offer of Coverage and Covered Individuals workfiles.

The Form 1095-C is reliant on the information in the 1095-C Offer and Coverage Information (F08119) and 1095-C Covered Individuals (F08120). This information must be built before you can print the Form 1095-C.
- 5. Run the Form 1095-C Print.
 - 1. You need to set up a version for the Form 1095-C Print program (P085192).
 - 2. From the Information Returns Workbench (P08210WB), inquire on the AIR ID you are processing.
 - 3. Enter Selection Option 6 (Print Form 1095-C).

When the Warning window appear, verify that the Version being called is correct and press F6.

If a version is not specified on the Information Return Revisions (P08210M) screen, then a Versions List window appears and you must select a version.
- 6. Wait for both Forms 1095-C print jobs to complete.
- 7. Review the BI Publisher PDF output file for accuracy and correct page breaks.
- 8. Print the BI Publisher PDF output file.

6.3 Making Corrections Prior to Filing with the IRS

You can make changes to Form 1095-C to correct inaccurate form information when you have not yet reported year-end data to the IRS. For example, an employee's address change does not appear on the Form 1095-C that you just printed because the new address is not yet entered into the Payroll system. If you have not yet submitted the returns information to the IRS, you can enter the address change and reprint Form 1095-C. If you have previously distributed a Form 1095-C to the employee, write the word *Corrected* on the form.

Note: If you find an entire group of employees with incorrect information, and you need to rerun the 1095-C Offer and Coverage and/or 1095-C Covered Individuals build process to correct them, you may run a reset to remove the build for an AIR ID so you can rerun the build.

See, [Section 4.5, "Reset Form 1095-C"](#)

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

Note: Enter an X in the corrected check-box only when correcting a Form 1095-C previously filed with the IRS. If you are correcting a Form 1095-C that was previously furnished to a recipient, but not filed with the IRS, write *Corrected* on the new Form 1095-C furnished to the recipient.

6.4 Creating and Reviewing Submitted or Transmitted Form 1094-C

This section discusses how to file Form 1094-C electronically.

6.4.1 Working with 1094-C ALE Members

The Work with 1094-Cs program (P08245) allows you to select 1094-Cs to include in a transmission file, called a Form Data file, for submitting to the IRS. You may select one or more 1094-Cs for each transmission. There will be a 1094-C for each combination of Reporting Year, AIR ID and Taxpayer ID. Each 1094-C selected creates a separate submission within the transmission.

The Work With 1094-Cs program allows you to:

- Select and deselect 1094-Cs for inclusion in a transmission.
- Launch the batch process to build a transmission.
- View a transmission record for a submitted 1094-C.
- View a submission record or records for a submitted 1094-C.
- View 1094-C detailed information.

If you select the Authoritative Transmittal 1094-C for a taxpayer, the program automatically selects all remaining unsubmitted non-authoritative 1094-Cs for that taxpayer. This is because the Authoritative Transmittal must include the total forms counts for all 1094-Cs.

Navigation

From Affordable Care Act (G08ACA), select ACA Information Returns

From ACA Information Returns (G08AIR), select Electronic Filing

From Electronic Filing (G08ACAEF), select Work with 1094-Cs

- On the Work with 1094-C program (P08245), enter the following:

Field	Description
ACA Reporting Year	The calendar year for which the ACA Health Coverage Information Return is being produced.
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 Identification Number	<p>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.</p> <p>This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.</p> <p>Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.</p>
Corrected Number	<p>This number is always zero on an original record.</p> <p>If a record has been submitted and accepted by the IRS, and changes are then made to the record, the system will flag the original record as Corrected and create a new record with the Corrected Number incremented by one.</p>

Field	Description
ACA Authoritative Transmittal Flag	<p>A flag to indicate whether or not the 1094-C is the authoritative transmittal for the ALE Member.</p> <p>Blank - The 1094-C is not the authoritative transmittal for the ALE Member</p> <p>X - The 1094-C is the authoritative transmittal for the ALE Member</p>
Reporting Company	<p>The company under which the 1094-C or 1095-C is reported. The reporting company is 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 ALE contains a single member.</p>
ACA Transmission Type	<p>Value identifying the type of ACA transmission to the IRS. This transmission type is used at the AIR ID level as well as at a transmission level. Valid Values:</p> <ul style="list-style-type: none"> ■ 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
ACA Submission ID	<p>An internal number assigned by the system to Affordable Care Act 1095-C returns.</p>
IRS Transmission & Submission Status	<p>Indicates the current status for a given ACA Form Data submission or transmission as communicated by the Internal Revenue Service. Valid values are:</p> <ul style="list-style-type: none"> ■ A: Accepted ■ P: Partially Accepted (Transmission ONLY) ■ R: Rejected ■ E: Accepted with errors

6.4.2 ACA Manifest and Form Data XML File Builds

An IRS transmission consists of two parts: the Manifest and the Form Data File.

- Each transmission must have Form 1094-C or 1095-Cs.
- The Manifest contains information about the transmitter, transmission and the payload.
- The Form Data File contains one or more submissions in XML format.
- A submission contains one Form 1094-C, and zero or more Form 1095-Cs.

You can use the information below to setup the parts needed to build and create the ACA Manifest & Form Data XML Files. When submitting files to the IRS, both a Manifest XML file and a Form Data XML file are required. The process utilizes the following:

1. A Manifest Information record that contains the information needed to produce the Manifest XML file.

2. The source XML document or file that contains the information from the JD Edwards files.
3. The XSL (Extensible Stylesheet Language) to be used to transform the source XML into the required IRS format. It contains the mapping information that describes how to transform the source XML into the target XML.
4. The target XML document or file that contains the required IRS formatted XML file.

Setup to Build and Create the ACA Manifest and Form Data XML Files

1. Setup a Manifest Information Record

The Manifest Information program allows you to enter and maintain the manifest information to be used when creating transmissions. The data resides in the Manifest Information file (F08213). The manifest file contains information about the transmitter and the entire transmission.

The Address Book Numbers for the Transmitter and Software Vendor are used to retrieve the names and phone numbers for contact individuals. For these individuals, their First, Middle and Surname are retrieved from the first Who's Who record for the Address Book Number.

2. Ensure Batch Export is enabled for the build program

The UDC table 00/BE (Batch Export Enabled Program) must contain the Manifest and Form Data XML Build (P08550). Values are:

Special Handling Code: YN

Hard Coded Y/N: Y

Note: The special handling code entry is important or the XML file is not created correctly.

3. Create an IFS Folder

You need an IFS folder in order to store the XSL template (FormData.xml) as well as the source and resulting target XML files. For example, home/ACA. A logical location for the XSL template would be in the same IFS directory you created for the Form 1095-C RTF template.

For more information on how to setup the IFS Folder, see *JD Edwards World Technical Tools Guide*

4. Copy the ACA Form Data File XSL (FormData.xml) from the Software Update to the new IFS folder.
5. Setup Electronic Document Delivery (EDD)

For more information on how to setup EDD, see *JD Edwards World Technical Tools Guide*

The following information explains the required EDD and DREAMWriter setup needed for building the ACA Manifest and Form Data XML files as well as the optional setup. If you want to generate e-mails automatically access the EDD Maintenance applications (G00E).

- Transformation Template

You create and define transformation templates to translate XML output from Import or Export using an XSL template or a BI Publisher (BIP) template. You

use an XSL template to transform an XML document from one form to another. You use a BIP template with XML input data to create an output report in various formats. Before you complete the Template File field in the transformation template, you must create the template file. For the ACA Manifest and Form Data File Build process, the XSL template has already been created for you (FormData.xsl) and is included in the Software Update.

You must create a Transformation Template to tell the system:

- The name of the XSL template.
- The IFS path where the XSL template resides.
- The name of the resulting target XML file.
- The IFS path where the source XML and resulting target XML files reside.

Note: The output file name must be entered as 1094C_Request_XXXXX_@DATET@TIMEZ.xml, where XXXXX is the company-specific Transmitter Control Code (TCC) assigned to you by the IRS. Any other output format is rejected by the IRS.

■ **Distribution Profile**

You set up a distribution profile to define how you want to distribute a document and the individuals that receive the document. You select a method for distribution, such as e-mail, print, FTP, or SFTP.

Even if you do not plan on having the resulting XML files distributed, the system still requires that you create and define a Distribution Profile with minimal information.

Note: You must not submit a Form Data File that is sent through e-mail to the AIR system. When the Form Data File XML and Manifest XML are created, a checksum is calculated on the Form Data File and stored in the Manifest. The checksum could be altered if the Form Data File is sent through e-mail.

■ **Manifest and Form Data File Build (P08550)**

You must update version ZJDE0001 for Form ID P08550 to specify the Batch Export Parameters. Any other versions created is not recognized by the process at this time.

Note:

1. The Batch Export Parameters (Spool File Export Parm) are user specific based on the User ID of each user so if multiple people are processing and running the ZJDE0001 version, they cannot interfere with each other.
 2. If you want to view or change the parameters for a specific user, access the Spool File Export Parameters program from the Import/Export menu (G00PCIE).
-
-

6. Ensure that the Offer and Coverage Build, the Covered Individuals Build, the Form 1095-C Print, and the 1094-C Employee Counts are run. All of these can run from the Information Returns Workbench (G08AIR, option 2). The Offer and

Coverage Build, the Covered Individuals Build, and the 1094-C Employee Counts can also be run from their own Menu Items.

7. Verify the 1094-C Transmittal Record(s).

Ensure the 1094-C information is correct for each 1094-C to be included in your transmission. The Address Book Numbers for the Reporting Company Contact and Designated Government Entity Contact (DGE) are used to retrieve the names and phone numbers for contact individuals. For these individuals, their First, Middle, and Surname are retrieved from the first Who's Who record for the Address Book Number.

Note: The Signature, Date Signed, and Contact Title are not being used for the 2015 filing.

8. Build the Manifest and Form Data File Transmission and XML Files.

9. Wait for the Manifest and Form Data File Build jobs to complete.

There are two jobs that are submitted when you run the Manifest and Form Data File Build. They are:

- System i spool file

A System i spooled file is produced, which is used to export to JD Edwards format xml. The JD Edwards xml is then transformed into the IRS Form Data File xml. A System i spool file cannot be submitted to the IRS because there is information to the very far right that is written to the spool file and is used in the creation of the .xml files. The layout of the spool file prints out in portrait format instead of landscape. The spool file can be used as an audit of the information included in the Manifest and Form Data XML files but they cannot be used for anything else.

- EDD

The EDD job creates the .xml files.

Once you see that both jobs have completed, you can go to the IFS folder created earlier to locate the resulting Form Data File XML and Manifest XML files of your transmission and submit them to the IRS.

6.4.3 Working with ACA Transmissions (P08246)

The Work with Transmissions program (P08246) allows you to review and update transmissions and their status information. If a transmission has not been submitted to the IRS, you may delete it if you no longer want it. A detail program allows entry of the transmission's Submission Date and Status and a unique Receipt ID returned from the IRS. You may also go to view individual submissions within the transmission.

The XML Schemas for Forms 1094-C and 1095-C include elements designed to uniquely identify ACA Information Returns transmissions, submissions within the transmission, and records within the submission. The batch transmission build program generates a Unique Transmission ID for each transmission you build. Unique IDs are used to simplify and increase the precision of communications, replacements and corrections.

The system identifies each transmission with Reporting Year and a Unique Transmission ID (UTID). A transmission contains one or more submissions.

The IRS AIR system checks each transmission to ensure that the UTID is unique. If the UTID is not unique, the transmission is rejected and no further processing occurs on the transmission.

Selection Option 1 allows you to view the ACA Submissions included in this transmission. Selection Option 5 allows you to go a detail view of the ACA Transmission record, where you can update IRS Transmission Status, Type of Rejection, Receipt ID and Submitted Date.

Navigation

From Affordable Care Act (G08ACA), select ACA Information Returns

From ACA Information Returns (G08AIR), select Electronic Filing

From Electronic Filing, select Work with ACA Transmissions

- On the Work with ACA Transmissions program (P08246), enter the following:

Field	Description
Transmission ID (UTID)	<p>A unique number identifying a transmission. A transmission may include multiple submissions (groups of one 1094-C and its associated 1095-Cs), but may not exceed 100MB.</p> <p>The format for the UTID includes various fields separated by colons (:) as follows:</p> <ul style="list-style-type: none"> ■ 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 Transmitters 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. <p>For example, the UTID for the transmission is as follows: 550e8400-e29b-41d4-a716-446655440000:SYS12:BB002::T</p>
Receipt ID	<p>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</p>
Transaction Originator	<p>The person who originally entered the transaction.</p>
ACA Submission Date	<p>The date the 1095-C return for the employee was submitted to the Internal Revenue Service (IRS).</p>

Field	Description
ACA Transmission Type	Value identifying the type of ACA transmission to the IRS. Valid values are: <ul style="list-style-type: none"> ▪ O: A transmission containing original Form 1094-C and Form 1095-C records. ▪ C: A transmission containing correction Form 1094-C and Form 1095-C records. ▪ R: A transmission containing replacement Form 1094-C and Form 1095-C records.
IRS Transmission & Submission Status	Indicates the current status for a given ACA Form Data submission or transmission as communicated by the Internal Revenue Service. Valid values are: <ul style="list-style-type: none"> ▪ A: Accepted ▪ P: Partially Accepted (Transmission ONLY) ▪ R: Rejected ▪ E: Accepted with errors
Transmission 1094-C Record Count	The number of 1094-C records being transmitted to the IRS.
Transmission 1095-C Record Count	The number of 1095-C records being transmitted to the IRS.

6.4.4 Working with ACA Submissions (P08247)

The Work with Submissions program (P08247) allows you to review Submissions and enter a Submission Status if required.

AIR processes each submission and provides a status and detailed acknowledgement for the Transmitter

If the Transmission Status returned from the IRS is Accepted (A) or Rejected (R) the status on each submission in the transmission is updated with the same status. If the Transmission Status is Partially Accepted (P) or Accepted with Errors (E), you must enter each Submission Status, since each may be different than the Transmission Status.

Selection Option 5 allows you to go to a detail view of the submission record.

Navigation

From Affordable Care Act (G08ACA), select ACA Information Returns

From ACA Information Returns (G08AIR), select Electronic Filing

From Electronic Filing, select Work with ACA Submissions

- On the Work with ACA Submissions program (P08247), enter the following:

Field	Description
Transmission ID (UTID)	<p>A unique number identifying a transmission. A transmission may include multiple submissions (groups of one 1094-C and its associated 1095-Cs), but may not exceed 100MB.</p> <p>The format for the UTID includes various fields separated by colons (:) as follows:</p> <ul style="list-style-type: none"> ■ 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 Transmitters 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. <p>The UTID for the transmission is as follows: 550e8400-e29b-41d4-a716-446655440000:SYS12:BB002::T</p>
IRS Submission Sequence Number	<p>An internal number assigned by the system to Affordable Care Act 1095-C returns. It uniquely identifies a single submission of 1095-C records to the IRS. This number is also assigned to the corresponding 1094-C record.</p>
AIR ID	<p>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.</p>
Transaction Originator	<p>The person who originally entered the transaction.</p>
IRS Submission Sequence Number	<p>An internal number assigned by the system to Affordable Care Act 1095-C returns. 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.</p>
IRS Transmission & Submission Status	<p>Indicates the current status for a given ACA Form Data submission or transmission as communicated by the Internal Revenue Service. Valid values are:</p> <ul style="list-style-type: none"> ■ A: Accepted ■ P: Partially Accepted (Transmission ONLY) ■ R: Rejected ■ E: Accepted with errors
Employer Tax Identification Number	<p>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.</p> <p>This number has specifically been established for the Payroll system to handle the requirements of taxing authorities that require more than nine positions for the tax identification number.</p> <p>Do not enter hyphens (dashes), slashes, spaces, or other punctuation in the tax identification number.</p>

Field	Description
ACA Authoritative Transmittal Flag	<p>A flag to indicate whether or not the 1094-C is the authoritative transmittal for the ALE Member.</p> <ul style="list-style-type: none"> ▪ 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

6.5 Replacement Process

This section explains the process for replacing a rejected Transmission.

6.5.1 Transmissions 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 error that was detected.

When a transmission is rejected at the IRS Portal, the transmitter must fix the problem that caused the rejection and should resubmit 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.

Once the error causing the rejection is fixed, you create the replacement transmission using Option 2 from the Work with Transmissions program (P08246). Once the replacement transmission XML files have been created, you transmit to the IRS through the AIR system Web portal similar to the original transmissions.

6.5.2 Transmissions Rejected by the AIR System

Replacement transmissions must be filed when a transmission is rejected by the AIR system. When the AIR system rejects the transmission, the error code returned to the transmitter is prefixed with AIR. For the processing year 2019, AIR System includes submission level rejections along with Transmission level rejections. None of the records included in a transmission or submission that is rejected are maintained in IRS data stores. Thus, when a transmission is rejected by IRS, it must be replaced entirely. The transmission types that are supported are:

Value	Description
O	A transmission containing original records
C	A transmission containing correction records
R	A transmission containing replacement records

6.6 Transmitting Replacements

Beginning with Processing Year 2016, Transmitters are able to replace rejected Transmissions, as well as rejected Submissions. This section explains the process for replacing a Transmission or Submission.

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.

6.6.1 Transmission Replacements

Once the error causing a rejection has been fixed, you request a Replacement Transmission using option 2 from the Work with Transmissions program (P08245). The system builds a replacement transmission that adheres 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.

Once the replacement transmission XML Form Data file and Manifest have been built, you transmit them to the IRS through the AIR System Web portal similar to an original transmission.

6.6.2 Submission Replacements

Beginning with Processing year 2016, the IRS may reject an individual submission within a Transmission. In this case the Transmission Status is Partially Accepted and the Submission Status is Rejected. Once the error causing the rejection has been fixed, you request a replacement submission using option 2 from the Work with Submissions program (P08247). The system builds a new transmission containing the replacement submission, which adheres 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.

Once the replacement transmission XML Form Data file and Manifest have been built, you transmit them to the IRS through the AIR System Web portal similar to an original transmission.

6.7 Understanding Corrected Forms 1094-C and 1095-C

As a Benefits Administrator, you may have to generate and submit corrected Forms 1094-C and 1095-C. If the previously filed and accepted returns contains 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.

6.7.1 Understanding Form 1095-C Corrections

Before a Form 1095-C has been submitted and accepted by the IRS, the IRS considers the 1095-C original. If you need to make a change to the Form 1095-C information, you do so on the original records, either by rerunning the build processes or by manually adjusting the records. If the Form 1095-C has been printed and the paper form distributed to the employee, you reprint the original record. You need to write the word *Corrected* on the paper Form 1095-C.

Once the Form 1095-C has been submitted and accepted by the IRS, the IRS now retains a record of the original Form 1095-C. Now, if you need to make a change to the Form 1095-C information, do the following:

1. You must enter a Correction AIR ID that references the original AIR ID.
2. When making changes to the Form 1095-C information, either by the batch build process or manually, the system marks the original 1095-C as having been corrected and creates new records with the updated information. The new records are associated with the Correction AIR ID and display a Correction Number greater than zero.
3. You need to print the Correction AIR ID Form 1095-Cs and distribute the updated paper Form 1095-Cs to employees. You must manually mark these with a value X in the CORRECTED box.
4. You rerun the 1094-C build process to create new 1094-C records where needed.
5. You submit the Correction AIR ID for a transmission build in the same manner as the original AIR ID. The system automatically makes the necessary adjustments to show the transmission as a Transmission Type C (Corrected).

Note: Corrections to Form 1095-C records which were originally submitted with a non-authoritative transmittal Form 1094-C are submitted with a new non-authoritative transmittal Form 1094-C. Corrections to Form 1095-C records which were originally submitted with the authoritative transmittal Form 1094-C are submitted with a new original authoritative transmittal Form 1094-C. In this instance, the AIR ID Transmission Type is C (Correction), but the 1094-C is still the original.

6.7.2 Understanding Authoritative Transmittal 1094-C Corrections

Until an authoritative transmittal Form 1094-C has been submitted and accepted by the IRS, the IRS considers the authoritative transmittal 1094-C original. If you need to make a change to the authoritative transmittal Form 1094-C information, you do so on the original records by manually adjusting the records. Changes are not needed on non-authoritative transmittal 1094-C records, since the system automatically updates Form 1095-C counts.

Once the authoritative transmittal Form 1094-C has been submitted and accepted by the IRS, the IRS now retains a record of the original authoritative transmittal Form 1094-C. Now, if you need to make a change to the authoritative transmittal Form 1094-C information, do the following:

1. No correction AIR ID is necessary.
2. When making changes to the authoritative transmittal Form 1094-C information, the system marks the original authoritative transmittal Form 1094-Cs as corrected

and creates new records with the updated information. The new records show a Correction Number greater than zero.

3. You submit the corrected authoritative transmittal Form 1094-C for a transmission build in the same manner as the original authoritative transmittal Form 1094-C. When you select the corrected authoritative transmittal Form 1094-C for a transmission build, the corrected authoritative transmittal Form 1094-C is always built into a submission containing only the authoritative transmittal Form 1094-C (no 1095-C records). The system automatically makes the necessary adjustments to show the transmission as a Transmission Type C (Corrected).

6.7.3 Correcting an Accepted Submission

Once a Submission has been accepted by the IRS, you need to update the Submission status to A (Accepted) or E (Accepted with Errors). The IRS now has a permanent record of the original Forms 1094-C and 1095-C. If you still need to make a change to the Form 1095-C, the system will:

- Edit to make sure a Correction AIR ID has been entered for the Original AIR ID (the AIR ID being corrected).
- Instead of changing the original record, the system will flag the original record as having been corrected, and write a new record with the corrected information.
- This new record will have a Line Number (RCK5) field incremented by one relative to the original record.
- The correction record may be changed multiple times, until it is submitted and accepted by the IRS.
- If you make a change to a Covered Individual record, the system automatically creates a correction record for the Offer and Coverage record.

You build and submit a correction transmission similar to an original transmission. The system automatically makes the necessary changes to the XML elements to meet the correction requirements.

Note: If you need to make a correction to the Authoritative Transmittal 1094-C for a taxpayer, a correction AIR ID is not required. If you need to make a change to a submitted and accepted Authoritative transmittal 1094-C, the system will:

- Instead of changing the original record, the system will flag the original record as having been corrected, and write a new record with the corrected information.
 - This new record will have a Line Number (RCK5) field incremented by one relative to the original record.
 - The correction record may be changed multiple times, until it is submitted and accepted by the IRS.
-
-

When the corrected Authoritative Transmittal 1094-C record is selected for a transmission build, it is placed in a separate Submission containing only the Authoritative Transmittal 1094-C.

Note: Non-authoritative transmittal 1094-Cs are not corrected.

Processing Options

This chapter contains the following topics:

- Section 7.1, "ALE ID Home Co Xref Conversion - Proof or Final (P08116C)"
- Section 7.2, "Periods Of Employment - Batch Z (P08118Z)"
- Section 7.3, "Offer and Coverage Batch Z (P08119Z)"
- Section 7.5, "ACA Hours Worked Per Month Z Batch (P08124Z)"
- Section 7.6, "Information Returns Workbench (P08210WB)"
- Section 7.7, "Periods Of Employment Inquiry (P08218)"
- Section 7.8, "1095-C Offer and Coverage Inquiry (P08219)"
- Section 7.9, "1095-C Covered Individuals Inquiry (P08220)"
- Section 7.10, "ACA - ALE Member Information Inquiry (P08221)"
- Section 7.11, "Hours Worked by Month Inquiry (P08224)"
- Section 7.12, "Work with 1094-Cs (P08245)"
- Section 7.13, "Work with ACA Transmissions (P08246)"
- Section 7.14, "Work with ACA Submissions (P08247)"
- Section 7.15, "Offer & Coverage Information Report (P08419)"
- Section 7.16, "1095-C Covered Individuals Report (P08420)"
- Section 7.17, "Hours Worked by Month Report (P08424)"
- Section 7.18, "Build ACA Transmissions/Submissions (P08511)"
- Section 7.19, "1095-C Offer and Coverage Report (P08519)"
- Section 7.20, "Reset Form 1095-C Information (P085191)"
- Section 7.21, "Form 1095-C Print (P085192)"
- Section 7.22, "Build 1095-C Covered Individuals (P08520)"
- Section 7.23, "1094-C Monthly Count Batch Program (Proof or Final) (P08522)"
- Section 7.24, "Hours Worked by Month Build (P08524)"

7.1 ALE ID Home Co Xref Conversion - Proof or Final (P08116C)

Processing Option	Description
FILE RECORD PROCESSING:	
1. Enter the Effective From Date for each ALE ID record. Date format: MM/DD/YY	
PROOF/FINAL MODE:	
2. Enter an 'F' to run the Final Update and Report. Default of 'P' will run Proof mode - no update will occur and only a report will be produced.	

7.2 Periods Of Employment - Batch Z (P08118Z)

Processing Option	Description
ERROR REPORTING:	
1. Enter '1' to skip printing the error report. If left blanks, the report will print.	
2. Enter the version to be used to call the error report program (P00ZERR). If left blank, ZJDE0034 will be used.	

7.3 Offer and Coverage Batch Z (P08119Z)

Processing Option	Description
ERROR REPORTING:	
1. Enter '1' to skip printing the error report. If left blanks, the report will print.	
2. Enter the version to be used to call the error report program (P00ZERR). If left blank, ZJDE0031 will be used.	

7.4 ACA - Covered Individual - Z File (P08120Z)

Processing Option	Description
ERROR REPORTING:	
1. Enter '1' to skip printing the error report. If left blanks, the report will print.	
2. Enter the version to be used to call the error report program (P00ZERR). If left blank, ZJDE0032 will be used.	

7.5 ACA Hours Worked Per Month Z Batch (P08124Z)

Processing Option	Description
	ERROR REPORTING:
	1. Enter '1' to skip printing the error report. If left blanks, the report will print.
	2. Enter the version to be used to call the error report program (P00ZERR). If left blank, ZJDE0033 will be used.

7.6 Information Returns Workbench (P08210WB)

Processing Option	Description
	PRE-LOADED DATA SELECTIONS:
	1. Any values entered in the following options will be loaded upon entry into the program:
	<ul style="list-style-type: none"> ▪ Reporting Year ▪ AIR ID ▪ 1095-C Build Code . (* = All) ▪ 1095-C Print Code . (* = All) ▪ 1094-C Build Code . (* = All)

7.7 Periods Of Employment Inquiry (P08218)

Processing Option	Description
	PRE-LOADED DATA SELECTIONS:
	1. Any values entered in the following options will be loaded upon entry into the program:
	<ul style="list-style-type: none"> ▪ Reporting Year ▪ Employee Number ▪ From Start Date ▪ Thru Start Date ▪ From Termination Date ▪ Thru Termination Date

7.8 1095-C Offer and Coverage Inquiry (P08219)

Processing Option	Description
	PRE-LOADED DATA SELECTIONS:

Processing Option	Description
	1. Any values entered in the following options will be loaded upon entry into the program:
	<ul style="list-style-type: none"> ■ Reporting Year ■ Original/Corrected (*=All) ■ Summary/Detail ■ Employer Tax ID ■ Reporting Company ■ Review Status (*=All) ■ AIR ID ■ Submission ID
	DREAM WRITER VERSIONS:
	2. Covered Individual Inquiry (P08220)

7.9 1095-C Covered Individuals Inquiry (P08220)

Processing Option	Description
	PRE-LOADED DATA SELECTIONS:
	1. Any values entered in the following options will be loaded upon entry into the program:
	<ul style="list-style-type: none"> ■ Reporting Year ■ Original/Corrected (*=All) ■ Summary/Detail ■ Employer Tax ID ■ Reporting Company ■ Review Status (*=All) ■ AIR ID
	DREAM WRITER VERSIONS:
	2. Offer Of Coverage Inquiry (P08219)

7.10 ACA - ALE Member Information Inquiry (P08221)

Processing Option	Description
	PRE-LOADED DATA SELECTIONS:

Processing Option	Description
	<p>1. Any values entered in the following options will be loaded upon entry into the program:</p> <ul style="list-style-type: none"> ▪ Reporting Year ▪ AIR ID ▪ Reporting Company ▪ Employer Tax ID ▪ Authoritative Trans Flag (*=All). ▪ Corrected (* = All) ▪ Large Employer ALE
	<p>DREAM WRITER VERSIONS:</p> <p>Enter the Version for each program.</p> <p>If left blank, ZJDE0001 will be used.</p>
	<p>2. Offer and Coverage Inquiry (P08219)</p>

7.11 Hours Worked by Month Inquiry (P08224)

Processing Option	Description
	<p>PRE-LOADED DATA SELECTIONS:</p> <p>1. Any values entered in the following options will be loaded upon entry into the program:</p> <ul style="list-style-type: none"> ▪ Reporting Year ▪ Employee ▪ Home Company ▪ Employer Tax ID

7.12 Work with 1094-Cs (P08245)

Processing Option	Description
	<p>PRE-LOADED DATA SELECTIONS:</p>

Processing Option	Description
	<p>1. Any values entered in the following options will be loaded upon entry into the program:</p> <p>Reporting Year</p> <p>AIR ID</p> <p>Reporting Company</p> <p>Employer Tax ID</p> <p>Transmission Type (*=All)</p> <p>Submission Status (*=All)</p> <p>Selected. (*=All)</p>
	<p>DREAM WRITER VERSIONS:</p>
	<p>2. Enter the version for each program. If left blank, version ZJDE0001 will be used.</p> <p>Work with Transmissions (P08246)</p> <p>Work with Submissions (P08247)</p> <p>Build ACA Transmissions (P08511)</p> <p>1094-C Transmittal Inq (P08221)</p> <p>Offer and Coverage Inq (P08219)</p>

7.13 Work with ACA Transmissions (P08246)

Processing Option	Description
	<p>PRE-LOADED DATA SELECTIONS:</p>
	<p>1. Any values entered in the following options will be loaded upon entry into the program:</p> <p>Reporting Year</p> <p>Originator</p> <p>Date Created</p> <p>Transmission Type (*=All)</p> <p>Transmission Status (*=All)</p> <p>Date Submitted</p> <p>Receipt ID</p>
	<p>DREAM WRITER VERSIONS:</p>

Processing Option	Description
	2. Enter the version for each program. If left blank, version ZJDE0001 will be used.
	Work with Submissions (P08247)
	Build ACA Transmission (P08511)

7.14 Work with ACA Submissions (P08247)

Processing Option	Description
	PRE-LOADED DATA SELECTIONS:
	1. Any values entered in the following options will be loaded upon entry into the program:
	Reporting Year
	Originator
	Date Created
	AIR ID
	Transmission Status (*=All)
	DREAM WRITER VERSIONS:
	2. Enter the version for each program. If left blank, version ZJDE0001 will be used.
	Offer and Coverage Inquiry (P08219)
	Build ACA Transmissions (P08511)

7.15 Offer & Coverage Information Report (P08419)

Processing Option	Description
	DATA PRINT/FORMATTING:
	1. Enter '1' to print the entire Social Security Number. If left blank, only the last 4 digits will appear.
	Data entered into the processing option will provide functionality to the job being processed and is pre-defined within the context of the program. Each form ID has a unique set of processing options.
	2. Enter '1' to bypass the page break for each new employee. If left blank, a new employee will start on a new page.

Processing Option	Description
	3. Enter '1' to print corrected records. If left blank, only the current/correct record will print for summary/detail Offer & Coverage as well as Covered Individuals.
	4. Enter '1' to bypass printing detail Offer & Coverage records. If left blank, both summary and detail records will print.
	5. Enter '1' to bypass printing Covered Individuals. If left blank, Covered Individuals will print

7.16 1095-C Covered Individuals Report (P08420)

Processing Option	Description
1. Enter '1' to print summary records only. If left blank, both detail and summary records will be printed.	Data entered into the processing option will provide functionality to the job being processed and is pre-defined within the context of the program. Each form ID has a unique set of processing options.

7.17 Hours Worked by Month Report (P08424)

Processing Option	Description
1. Enter '1' to print totals. If left blank, no totals will print.	Data entered into the processing option will provide functionality to the job being processed and is pre-defined within the context of the program. Each form ID has a unique set of processing options.

7.18 Build ACA Transmissions/Submissions (P08511)

Processing Option	Description
XML TRANSMISSION THRESHOLD:	
1. Enter the threshold number of bytes at which point the Build XML program will be called for the AIRIs selected. If left blank, xxxxxxxx will be used.	
MANIFEST INFORMATION:	

Processing Option	Description
2. Enter the Template Name and Type for the Manifest Information to apply to the Transmission. If left blank or no record is found, an error will occur.	This is the name of the Transformation Template. A Transformation Template contains the file names and paths of a Transformation Template File and a Transformation Output File.
Template Name	Indicates the type of template, such as, XSL or BI Publisher.
Template Type	In this processing option the template type is 1, that is, XSL template.
AIR TEST SCENARIO (Test Transmissions)	
3. Enter the AIR Test Scenario ID associated with the pre-defined test (e.g. 3-0) that is being submitted to the IRS for review and acceptance.	

7.19 1095-C Offer and Coverage Report (P08519)

Processing Option	Description
BENEFITS SETUP:	
1. Enter the source of the beginning Effective Date for processing Employee Enrollment (F08330) records.	
Blank/EF = Effective Date	
DB = DBA Begin Date	
ED = Eligibility Date	
PD = Participation Date	
UD = User Defined Date	
PLAN SELF-INSURED:	
2a. Enter the Benefits Plan Master (F08320) Category Code (PH01 - PH10) data item that identifies a plan as a self-insured plan. If left blank, or no match is made using the value in 2b, the plan will be considered NOT self-insured.	
2b. Enter the value of the Plan Master Category Code that indicates a plan is a self-insured plan.	
DBA REPORTABLE:	

Processing Option	Description
3a. Enter the Payroll Transactions (F069116) Report Code (PR01 - PR10)	data item that identifies a DBA as reportable for health coverage reporting. If left blank, the DBA will be considered NOT reportable.
3b. Enter the value of the Payroll Transactions Report Code that indicates a DBA is reportable for health coverage reporting.	
DBA SELF-INSURED:	
4a. Enter the Payroll Transactions (F069116) Report Code (PR01 - PR10)	data item that identifies a DBA as employer sponsored self-insured health coverage. If left blank, or no match is made with the value in 4b, the DBA will be considered NOT self-insured.
4b. Enter the value of the Payroll Transactions Report Code that indicates a DBA is employer sponsored self-insured health coverage.	
WAIVED COVERAGE:	
5a. Enter the Employee Master (F060116) Eligibility Code (E001 - E010)	data item that identifies that an employee was offered health coverage but waived coverage. If left blank, or no match is made with the value in 5b, we assume the employee has NOT waived coverage.
5b. Enter the value of the Employee Master Eligibility Code that indicates the employee has waived coverage.	
5c. 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.

Processing Option	Description
5d. Enter the Employee Master (F060116) User Defined Date (ED01 - ED20) data item that identifies the end date of the employee's waive of an offer of health coverage for the reporting year.	PROCESSING
6. Choose which date will be used when retrieving DBA Detail History(F0619) for each month when determining offer and coverage based on DBA history.	Blank/WD = Work Date PE = Pay Period Ending Date CD = Check Date
7. Enter '1' to Submit the 1095-C Covered Individual Workfile Build (P08520).	
8. Enter '1' to assign Safe Harbor Codes values (Form 1095-C Line 16). If left blank, no Safe Harbor values will be written to Offer of Coverage records.	
9. Enter '1' to assign the month of January on Form 1095-C Line 16 with '2B' if January start date of coverage is not the 1st. If value entered is blank, then do not fill with '2B', even if start day is not the 1st.	
10. Enter '1' to 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.	
11. 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 Offer of Coverage Inquiry (P08219).	

Processing Option	Description
	12. Enter description text used to identify when a Benefit Plan or Plan Option is the employee's waive of an offer of health coverage for the reporting year. Verification will begin at the first character of the Benefit Plan or Plan Option description.

7.20 Reset Form 1095-C Information (P085191)

Processing Option	Description
	1. Enter '1' to reset protected records. If left blank (default), protected records will not be reset.

7.21 Form 1095-C Print (P085192)

Processing Option	Description
	1. Enter '1' to print the employee and employer addresses on the reverse side of the Form 1095-C. If left blank, these addresses will not print.
	2. Enter '1' to print the full social security numbers for employees and covered individuals. If left blank, the first five digits of the social security numbers will be masked
	3. Enter the employer contact telephone number. If left blank, the employer contact phone on the 1094-C Transmittal will be used
	4. What country does the blank value stand for in UDC 00/CN? 1 = United States (Default) 2 = Other

7.22 Build 1095-C Covered Individuals (P08520)

Processing Option	Description
	BENEFITS SETUP:

Processing Option	Description
	1. Enter '1' to report dependents in Part III even if Plan ID/Plan Option are blank.
	REPORTING:
	2. Enter the Version of the 1095-C Covered Individuals report to call (P08420). If left blank, no report will print. ** NOTE: You must setup Data Selection for the version entered to match the Data Selection for the build to have only the employees requested in the build appear on the report
	WAIVED COVERAGE:
	3. Enter description text used to identify when a Benefit Plan or Plan Option is the employee's waive of an offer of health coverage. Verification will begin at the first character of the Benefit Plan or Plan Option description.
	DATA SOURCE
	4. Choose which date will be used when retrieving DBA Detail History file (F0619) for each month when determining months covered based on DBA history. Blank/WD = Work Date PE = Pay Period Ending Date CD = Check Date

7.23 1094-C Monthly Count Batch Program (Proof or Final) (P08522)

Processing Option	Description
	PROOF/FINAL MODE:
	1. Enter a '1' to run the count in final mode. If left blank, the program will be run in proof mode and no updates will occur.

Processing Option	Description
	2. Enter a '1' to bypass update/print of FTE and Total Employee Counts even in FINAL mode. If left blank, these employee counts will be updated.
	REPORTING YEAR:
	3. Enter the reporting year you would like to process. This field is required.
	DAY OF MONTH:
	4a. Enter one of the following to specify how you want to calculate employment status: A = First Day of The Month B = Last Day of The Month C = 12th Day of The Month D = First Day of First Payroll Period or Last Day of Last Payroll of Each Month If you select 'D', enter the day to use for each calendar month on the next page.
	4b. Enter the day of the first payroll period for each month: January February March April May June July August September October November December
	1094-C ALE MEMBER INFORMATION:
	5. Enter the Related Address to use to locate the Reporting Company Contact. If left blank, the Reporting Company Address Number will be used.

Processing Option	Description
6.	Enter the Phone Type associated with the Reporting Company Contact. If left blank, the first phone located will be used.
BYPASS REPORT:	
7.	Enter '1' to bypass print of the count detail per month for each employee. If left blank, count detail and any errors will be printed.

7.24 Hours Worked by Month Build (P08524)

Processing Option	Description
1. Reporting Year	Enter the calendar year for which the Affordable Care Act (ACA) Health Coverage Information Return is being produced. Year is used to select timecards based on the date entered in the Based on Date processing option.
2. Enter the Pay Type Table to use for identifying which pay types will be included in this process. If left blank, DREAM Writer Data Selection will need to be setup to identify the pay types to be included.	Enter the name of the table you defined on user-defined code (UDC) table 08/TT in the Pay Type Tables program (P08393).
3. Enter one of the following values to identify which date should be used as the basis for selecting timecards and calculating totals. If blank, the system will use Date Worked. ' ' = Date Worked (default) P = Pay Period End Date C = Check Date	Enter a code to define the date field that the system uses in data selection to accumulate the hours worked by month. Values are: <ul style="list-style-type: none"> ▪ Blank: Date Worked (Default) ▪ P: Pay Period ▪ C: Check Date
4. Enter the Version ID for P08424 (Hours Worked by Month) to call. If left blank, no report will print.	The Hours Worked by Month report can be run as part of the Build, Hours Worked by Month process or as a standalone report. If you want to print the report as part of the build process, you must first define or modify a version for the Build Hours Worked by Month report (P08424). Then enter that version in this processing option. If no value is entered in this processing option, then the Hours Worked by Month report will not be submitted or printed.

Control Files and Sample Forms

This appendix contains the following topics:

- [Section A.1, "Control Files"](#)
- [Section A.2, "Sample Form 1095-C"](#)

A.1 Control Files

The system uses each of the following files in the AIR processing steps in this guide.

A.1.1 F08116 - ALE ID to Home Company X-Ref

This file allows multiple home companies to be grouped together under the same Applicable Large Employer (ALE) ID, effectively creating an ALE.

A.1.2 F081161 - Employee ACA Eligibility File

This file provides information on an employee's full-time or part-time status for ACA reporting, and also whether the employee has been in a Limited Non-Assessment Period.

A.1.3 F08117 - Offer and Coverage Setup

This file provides the code values for ACA Form 1095-C lines 14, 15, and 16.

A.1.4 F08118 - Periods of Employment

This file is used to determine employment dates, especially when there are multiple starts and terminations for an employee.

A.1.5 F08118DZ - ACA Periods of Employment - Z File

This is the detail import file for Periods of Employment.

A.1.6 F08118HZ - ACA Periods of Employment - Header Z File

This is the header import file for Periods of Employment.

A.1.7 F08119 - 1095-C Offer and Coverage Information

This file contains the final information that is used to produce the Form 1095-C for an ALE Member, Employee, or Reporting Year.

A.1.8 F08119Z - ACA Offer and Coverage Revisions - Batch Z

This is the import file for ACA Offer and Coverage.

A.1.9 F08120 - 1095-C Covered Individuals

This file contains information for Part III of the Form 1095-C (Covered Individuals).

A.1.10 F08120Z - ACA Covered Individuals - Batch Z File

This is the import file for ACA Covered Individuals.

A.1.11 F08121 - 1094-C ALE Member Information

This file contains information for Part I and Part II of the Form 1094-C.

A.1.12 F08122 - 1094C ALE Member Information - Monthly

This file contains information for Part III of the Form 1094-C.

A.1.13 F08123 - 1094C Other Aggregated ALE Group Members

This file contains information for Part IV of the Form 1094-C.

A.1.14 F08124 - Hours Worked by Month

This file accumulates the hours an employee worked during each month of the reporting year.

A.1.15 F08210 - ACA Information Returns Control

This file contains the control parameters for information common to each AIR ID.

A.1.16 F08211 - ACA Transmission

This file contains information about ACA Transmissions.

A.1.17 F08212 - ACA Submission

This file contains information about ACA Submissions.

A.1.18 F08213 - ACA Manifest Information

The file contains information used to create ACA Manifest XML files.

A.1.19 F08214 - Transmission Replacement Cross-Reference

This file is a cross-reference between replacement transmissions and the original transmission being replaced.

A.2 Sample Form 1095-C

This form is provided for informational purposes only. Do not reproduce this form for filing.

This is an example of the Form 1095-C:

Figure A-1 Sample of Employer-Provided Health Insurance Offer and Coverage (Form 1095-C)

600118

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
2019

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 **Plan Start Month** (enter 2-digit number):

14 Offer of Coverage (enter required code)	Plan Start Month (enter 2-digit number):												
	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
15 Employee Required Contribution (see instructions)	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)													

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) DCB (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
17				<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"/>
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"/>

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 60705M Form 1095-C (2019)

B

Sources for Forms 1095-C and 1094-C and 1095-C XML

This appendix contains the following topics:

- [Section B.1, "Understanding the Sources for Forms 1095-C and 1094-C and 1095-C XML"](#)
- [Section B.2, "How the Alias Works in EDD"](#)

B.1 Understanding the Sources for Forms 1095-C and 1094-C and 1095-C XML

The Form 1095-C print and the 1094-C or 1095-C XML files are handled through the JD Edwards Electronic Document Delivery (EDD) system. The system uses the data item aliases during the spool file batch export step to create XML source files, which are then used to map the information to:

- The Form 1095-C RTF file (for the printed Form 1095-C's)
- The XML XSL (XML transformation file used to map to the IRS XML schema) when creating the target (final) XML file for electronic filing

Ensure that you use the same alias names used by JD Edwards or the mapping of information fails and the information is left blank or empty on the form and the target XML file sent to the IRS.

Ensure that either the alias for each data item listed below matches the information below or you need to create an Alias Type of 4 with the exact Data Item Alias below in the Data field Alias window (P9204) by pressing F5 from the Data dictionary.

Note: Many fields used on the Form 1095-C and in the XML files are new data items created specifically for ACA. You should not have different aliases, since they are new, so they are excluded from the table below. The data items that are listed in the table below are some of the older and more established data items that may be different on your machines.

Form 1095-C (S085192)

Form Box	Data Item	Data Item Alias	Data Source
1	GNNM	NameGiven	F0111:WWGNNM

Form Box	Data Item	Data Item Alias	Data Source
1	MDNM	NameMiddle	F0111:WWMDNM
1	SRNM	NameSurname	F0111:WWSRNM
2	SSN	SocialSecurityNumber	F08119: AGSSN
3	ADD1	AddressLine1	F0116:ALADD1
3	ADD2	AddressLine2	F0116:ALADD2
3	ADD3	AddressLine3	F0116:ALADD3
4	CTY1	City9	F0116:ALCTY1
5	ADDS	State	F0116:ALADDS
6	CTR	Country	F0116:ALCTR
6	ADDZ	ZipCodePostal	F0116:ALADDZ
6	MSZC	ZipCode	F0116:ALADDZ
7	ALPH	NameAlpha9	F069086:YIPA8 or F069086:YICO, if YIPA8 is blank ' F0010:CCAN8 ' F0111:WWMLNM
8	TAXX	TaxIdentificationNo	F08119:AGTAXX
9	AD11	AddressLine1Int	F0116:ALADD1
9	AD12	AddressLine2Int	F0116:ALADD2
9	AD13	AddressLine3Int	F0116:ALADD3
10	PHN1	PhoneNumberOne	P/O or, if blank, F08121:AJPHN1
11	CTI1	City9Int	F0116:ALCTY1
12	ADIS	StateInt	F0116:ALADDS
13	CTRI	CountryInt	F0116:ALCTR
13	ADIZ	ZipCodePostalInt	F0116:ALADDZ
13	MSZE	ZipCodeExtension	F0116:ALADDZ
17-28 (SSN)	TAX	TaxId	F08120:AHTAX
Employer Address on back of Form			
ER Name	ALPH	NameAlpha9	
ER ADD1	AD11	AddressLine1Int	F0116:ALADD1
ER ADD2	AD12	AddressLine2Int	F0116:ALADD2
ER ADD3	AD13	AddressLine3Int	F0116:ALADD3
ER ADD4	AD14	AddressLine4Int	F0116:ALADD4
ER ADD5	AD15	AddressLine5Int	F0116:ALADD5
Employee Address on back of Form			
EE MLNM	MLNM	NameMailing	
EE ADD1	ADD1	AddressLine1	F0116:ALADD1

Form Box	Data Item	Data Item Alias	Data Source
EE ADD2	ADD2	AddressLine2	F0116:ALADD2
EE ADD3	ADD3	AddressLine3	F0116:ALADD3
EE ADD4	ADD4	AddressLine4	F0116:ALADD4
EE ADD5	ADD5	AddressLine5	F0116:ALADD5

B.2 How the Alias Works in EDD

If you have a different alias name, the information does not print on the form. It also causes an issue while you try to build the XML file to transmit to the IRS.

B.2.1 Example 1: Alias Different in the Client's DD

The following illustrates an example of an alias that is different in the client's Data Dictionary.

Figure B-1 Sample Data Dictionary

Data Dictionary	
Action Code	I
Data Item	ADD1 Glossary Group
Alias name	AddressLine19999

The DD alias is used to create the XML element tags in the source XML (this is the XML that will then be transformed by the RTF template to the final printed output PDF file)

Figure B-2 Sample XML File

```
<EMP_DTL4>
<EMP_AddressLine19999>1919 Pine Avenue</EMP_AddressLine19999>
<EMP_AddressLine2>
<EMP_AddressLine3>
</EMP_DTL4>
```

The RTF template uses the data item aliases that is existing in the JD Edwards system. As your alias is different from the system, the field does not get mapped and it is left blank in the PDF.

Figure B-3 Sample PDF Output

1095-C		Employer-Provided Health Insurance
Form 1095-C Department of the Treasury Internal Revenue Service		Information about Form 1095-C and its separate instructions is at w
Part I Employee		
1 Name of employee Erika Gavilton	2 Social security number (SSN) XXX-XX-0411	
3 Street address (including apartment no.)		
4 City or town Germanstown	5 State or Province WI	6 Country and ZIP or foreign postal code US 53022

B.2.2 Example 2: Alias Different in the Client's DD

If the alias is different on your machine, you must enter a value 4 in the Data Field Alias window (F5 from the D/D).

The value you enter must match the alias available at JD Edwards system as that value is used to create the RTF file.

You must enter only the alias, not the prefix in the RTF. For example, for ADD1, enter AddressLine1, and not EMP_AddressLine1.

The DD alias type 4 will then be used as an override to create the XML element tags in the source XML instead of the alias on the base D/D item.

Figure B-4 Sample DD

The screenshot shows a window titled "Data Field Alias" with the following content:

```

9204 Data Field Alias
Action Code . . . 1
Data Item . . . ADD1
Address Line 1
Alias
Type Alias
1 ADDRESS_LINE_1
4 AddressLine1
F24=More
    
```

The DD alias type 4 value is used as an override to create the XML element tags in the source XML instead of the alias on the base DD item.

Figure B-5 Sample XML File

```

<EMP_DTL4>
<EMP_AddressLine1>1919 Pine Avenue</EMP_AddressLine1>
<EMP_AddressLine2/>
<EMP_AddressLine3/>
</EMP_DTL4>
    
```

The RTF template uses the data item aliases that is existing in the JD Edwards system and the field is mapped correctly. It now appears on the form.

Figure B-6 Sample PDF Output

Part 1 Employee		
1 Name of employee Erika Gavilton	2 Social security number (SSN) XXX-XX-0411	
3 Street address (including apartment no.) 1919 Pine Avenue		
4 City or town Germanstown	5 State or Province WI	6 Country and ZIP or foreign postal code US 53022