

# Oracle Fusion Cloud Human Resources

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## **Configure and Perform Affordable Care Act Reporting**

**FA Latest**



Oracle Fusion Cloud Human Resources  
Configure and Perform Affordable Care Act Reporting

FA Latest

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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# 1 What is Affordable Care Act reporting?

Affordable Care Act (ACA) reporting involves generating these forms.

- 1094-C (Electronic Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns)

This file can include info specific to filing returns for employees with a resident tax address during the year in:

- New Jersey
- Rhode Island
- Washington DC

For further info, see [How to Generate the Form 1094-C Electronic Data File](#).

- 1095-C (Employer-Provided Health Insurance Offer and Coverage)

ACA reporting isn't supported for retirees or employees enrolled in Consolidated Omnibus Budget Reconciliation Act (COBRA).

**Note:** The IRS provides comprehensive instructions on how to comply with and report your ACA enrollments, including definitions of key terminology. For further info, see Affordable Care Act (ACA) Tax Provisions on the IRS website.

Before you can perform any Affordable Care Act (ACA) reporting, there's some configuration you must do.

What you need to do	How you do it	For more info, check here in the Help Center
Fulfill the prerequisites	<p>You must have completed the following as of January 1 of the reporting year.</p> <ol style="list-style-type: none"> <li>1. Implemented Oracle Fusion Human Resources.  Or if having implemented during the year, have loaded the date-effective HR info from January 1 to the go-live date.</li> <li>2. Configured all benefit eligibility and enrollment.  Or if having implemented during the year, have loaded the date-effective benefit eligibility or enrollment changes from January 1 to the go-live date.</li> <li>3. You must opt-in to receive the annual December and January Statutory Maintenance packs if you're using one of these extensions.                             <ul style="list-style-type: none"> <li>◦ Human Resources or None</li> </ul> </li> </ol>	

What you need to do	How you do it	For more info, check here in the Help Center
	<ul style="list-style-type: none"> <li>○ Payroll Interface</li> </ul>	
Configure your legal employers	Use the Legal Entity HCM Information task from your implementation project.	<a href="#">How to Define Legal Employer Info for ACA Reporting</a>
Define the ACA Eligibility Attributes table	Use the Legal Entity HCM Information task from your implementation project.	<a href="#">How to Define the ACA Eligibility Attributes Table</a>
Configure your legal reporting units	Use the Legal Reporting Unit HCM Information task from your implementation project.	<a href="#">How to Configure Legal Reporting Units for Affordable Care Act Reporting</a>
Configure your tax reporting units	Use the Legal Reporting Unit HCM Information task from your implementation project.	<a href="#">How to Configure Tax Reporting Units for ACA Reporting</a>
Configure your benefits plan	Use the Benefit Plan Details task.	<a href="#">How to Configure Your Benefits Plans and Programs for ACA Reporting</a>
Configure ACA eligibility profiles	Use the Eligibility Profiles task.	<a href="#">How to Configure ACA Eligibility Profiles</a>
Define your organization's break-in-service rules	Use the Legal Entity HCM Information task from your implementation project.	<a href="#">Define Your Affordable Care Act Break-in-Service Rules</a>
Define balance feeds for eligible hours	Use the Balance Definitions task.	<a href="#">How to Define Balance Feeds for Affordable Care Act Employee Eligible Hours</a>
Add your employees' dependents	<ol style="list-style-type: none"> <li>1. From <b>My Client Groups</b>, click <b>Person Management</b>.</li> <li>2. Search for the person.</li> <li>3. In the search results, click <b>Personal and Employment</b> and then <b>Person</b>.</li> </ol>	<a href="#">Add Employee Dependents for Affordable Care Act Reporting</a>
Configure your employee assignments	<ol style="list-style-type: none"> <li>1. From <b>My Client Groups</b>, click <b>Person Management</b>.</li> <li>2. Search for the person.</li> <li>3. In the search results, click <b>Personal and Employment</b> and then <b>Employment</b>.</li> </ol>	<a href="#">How to Configure Individual Employee Assignments for ACA Reporting</a>
Prepare for state-specific reporting	Some states require special reporting configuration.	<a href="#">State-Specific Configuration for Affordable Care Act Reporting</a>
Register with the ACA Information Returns (AIR) system	Required if this is the first time you're filing with them.	<a href="#">Affordable Care Act Information Returns System</a>
Order paper stock with preprinted instructions	<p>For distributing Form 1095c, you can use ComplyRight paper stock with preprinted instructions.</p> <p>To order this stock, email ComplyRight at oracle@formstax.com and reference SKU L1095CBLK500.</p>	

What you need to do	How you do it	For more info, check here in the Help Center
	You can use standard business #10-C envelopes.	
Configure your 1094-C transmission manifest	Update your Form 1094-C transmission manifest.  Use a standard text editor to set these values. <ul style="list-style-type: none"> <li>• Unique transmission ID</li> <li>• Checksum number</li> <li>• Attachment byte size</li> </ul>	<a href="#">Configure the 1094-C Transmission Manifest</a>
Configure the Form 1095-C template	There are two areas that may require configuration, depending on your organization requirements. <ul style="list-style-type: none"> <li>• If you're using ComplyRight paper stock with preprinted instructions</li> <li>• If you need to mask Social Security Numbers (SSNs) appearing on the report</li> </ul>	<a href="#">Configure the Form 1095-C Template</a>

**Note:** This isn't a comprehensive list of possible configurations.



# 2 How to Get Ready for Affordable Care Act Reporting

## How to Configure Your Legal Entities

### Configure Legal Entities for Affordable Care Act Reporting

To prepare your environment for Affordable Care Act (ACA) reporting, you must set the required fields on your legal entities.

For each legal entity, you define:

- ACA legal employer info
- ACA Eligibility Attributes table
- Break-in-service rules

### How to Define Legal Employer Info for ACA Reporting

You must perform this configuration on each legal employer you are including for ACA reporting.

1. From **My Client Groups**, click **Workforce Structures**.
2. In **Organizations**, click **Manage Legal Entity HCM Information**.
3. In **Legal Employer**, click **Federal**.
4. In **Federal ACA Reporting Information**, specify the following.

Field name	What uses it	How it's used
DGE TRU Name	1094-C	Leave blank. The 1094-C Employer Report flow doesn't support Designated Government Entities (DGEs).
Aggregated ALE Group TRU Name	1094-C	Required for aggregated Applicable Large Employer (ALE) group employers.
Annual Announced Percentage	1094-C and 1095-C	Derives the 1A code for Form 1095-C, line 14.  You can obtain this percentage from the IRS or Society for Human Resource Management (SHRM). For further info, see their respective websites.

Field name	What uses it	How it's used
Annual Poverty Level Value	1094-C and 1095-C	Derives the 1A code for Form 1095-C, line 14.  You can obtain this value from the IRS or SHRM. For further info, see their respective websites.
Transmission Control Code	1094-C	5-character alphanumeric all-capital string containing the transmitter's control code (TCC). Used as part of the 1094-C file name.  Use the TCC assigned to you by the IRS when you applied to file electronically.
Offer of Coverage Override Value	1095-C	Overrides line 14 for all employees. This value overrides the default set by Oracle Fusion Benefits. An override here applies to all Forms 1095-C in this legal entity for the eligible period.  For further info, see <a href="#">How the ACA Flows Obtain Their Info</a> .
HRA Offered to Employees	1094-C and 1095-C	By default, this is <b>Yes</b> for all employees.  You can override this for individual employees at the assignment level. For further info, see <a href="#">How to Configure Individual Employee Assignments for ACA Reporting</a> .
Include Retirees	1094-C and 1095-C	Reserved for future use.

5. Save your changes.

## How to Define the ACA Eligibility Attributes Table

The ACA Eligibility Attributes table defines how the ACA Eligibility Process handles employee eligibility, based on the Affordable Care Act (ACA) eligibility profile you defined.

**Note:** This table has no default values. You must define at least one row. It's your responsibility to ensure the info you enter is correct and represents all possible eligibility conditions for all your employees.

To define the ACA Eligibility Attributes table:

1. From your implementation project, start the Legal Entity HCM Information task.

2. Open your legal entity for editing, and click **Edit**.
3. Under **Legal Employer**, click **Federal**.
4. In **ACA Eligibility Attributes**, click **Add Row**.
5. Set these values.

Column header	What you do
Processing Priority	<p>Set the order you want the ACA Eligibility Process to process this row.</p> <p><b>Note:</b>                      The lowest number is processed first. The process applies the first set of eligibility rules that fit for an employee before moving onto the next on. Be sure to set your most specific rules at the lowest priority.</p> <p>The process:</p> <ol style="list-style-type: none"> <li>a. Calculates eligibility from lowest priority to highest.</li> <li>b. For each ACA eligibility profile, it uses the effective date and the values in that row to determine if an employee's assignment requires update or correction.</li> <li>c. If an employee meets the criteria and requires update, it updates their info and moves to the next employee.</li> </ol>
Eligibility Profile	<p>Select the ACA eligibility profile you want to use for this priority.</p>
Outcome of Eligibility	<p>Based on the eligibility assigned to the profile, the process does the following.</p> <p><b>Always:</b> Employee is always eligible for benefits.</p> <p><b>Exclude:</b> The process skips this person and doesn't update their assignment.</p> <p><b>Note:</b>                      Use this profile when your ACA eligibility info is maintained:</p> <ul style="list-style-type: none"> <li>○ By a third party</li> <li>○ Separately and uploaded through a data loader, such as HCM Data Loader (HDL)</li> <li>○ Manually</li> </ul> <p><b>Never:</b> Employee is never eligible for benefits.</p> <p><b>No-monthly:</b> Employee is ineligible either initially or based on hours worked during their measurement period. Must work less than 130 hours a month.</p>

Column header	What you do
	<p><b>Note:</b>                      The process reevaluates their eligibility after each measurement period, based on their average monthly hours.</p> <p><b>No-weekly:</b> Employee is ineligible either initially or based on hours worked during their measurement period. Must work less than 30 hours per week.</p> <p><b>Note:</b>                      The process reevaluates eligibility after each measurement period, based on their average weekly hours.</p> <p><b>Yes-monthly:</b> Employee is eligible either initially or based on hours worked during the measurement period. Must work 130 or more hours per month.</p> <p><b>Note:</b>                      The process reevaluates eligibility after each measurement period, based on their average monthly hours.</p> <p><b>Yes-weekly:</b> Employee is eligible either initially or based on hours worked during their measurement period. Must work 30 or more hours a week.</p> <p><b>Note:</b>                      The process reevaluates eligibility after each measurement period, based on their average weekly hours.</p>
Initial Measurement Duration Start	<p>Identify the start of the employee's initial measurement period.</p> <p><b>First day of month:</b> First day of the month following the date of hire. If the employee was hired on the first day of a month, this is the first day of the following month.</p> <p><b>Hire date:</b> Date of employee hire.</p> <p><b>Start date of next pay period:</b> First payroll period start date following the date of hire.</p> <p><b>Start of pay period hire or next:</b> Date of employee hire if it lands on a pay period start date. Otherwise, the next pay period start date.</p> <p><b>Start of month hire or next:</b> Date of employee hire if it's the first day of the month. Otherwise, the first day of the month following the date of hire.</p>
Initial Measurement Duration Type	<p>Select the period type for the initial measurement period.</p>

Column header	What you do
Initial Measurement Duration Number	Set the number of months or days for the initial measurement period, to a maximum of three digits.
Initial Administrative Duration Start	<p>Identify the start of the initial administrative period.</p> <p><b>First day of month:</b> First day of the month following the date of hire. If the employee was hired on the first day of a month, this is the first day of the following month.</p> <p><b>Hire date:</b> Date of employee hire.</p> <p><b>Start date of next pay period:</b> First payroll period start date following the date of hire.</p> <p><b>Start of pay period hire or next:</b> Date of employee hire if it lands on a pay period start date. Otherwise, the next pay period start date.</p> <p><b>Start of month hire or next:</b> Date of employee hire if it's the first day of the month. Otherwise, the first day of the month following the date of hire.</p>
Initial Administrative Duration Type	Select the period type for the initial administrative period.
Initial Administrative Duration Number	Set the number of months or days for the initial administrative period, to a maximum of three digits.
Initial Stability Start Date	This value is derived.
Initial Stability Duration Type	Select the period type for the initial stability period.
Initial Stability Duration Number	Set the number of months or days for the initial stability period, to a maximum of three digits.
Ongoing Measurement Duration Start Date	Identify the start date of the ongoing measurement periods.
Ongoing Measurement Duration Type	Select the period type for the ongoing measurement periods.
Ongoing Measurement Duration Number	Set the number of months or days for the ongoing measurement periods, to a maximum of three digits.
Ongoing Administrative Start Date	Identify the start date of the ongoing administrative periods.

Column header	What you do
Ongoing Administrative Duration Type	Select the period type for the ongoing administrative periods.
Ongoing Administrative Duration Number	Set the number of months or days for the ongoing administrative periods, to a maximum of three digits.
Ongoing Stability Start Date	Identify the start date of the ongoing stability periods.
Ongoing Stability Duration Type	Select the period type for the ongoing stability periods.
Ongoing Stability Duration Number	Set the number of months or days for the ongoing stability periods, to a maximum of three digits.

6. Save your changes.

## Define Your Affordable Care Act Break-in-Service Rules

The ACA Break-in-Service Attributes table determines how your organization handles Affordable Care Act (ACA) eligibility for employees who have been terminated and rehired.

Depending upon the length of time away from employment and the duration of their employment prior to termination, the employee may be eligible to retain their previous benefits status.

There are no defaults and no data validation.

- You must define at least one row for each ACA Eligibility profile you've defined.
- You must define sufficient rows to capture all employee cases.
- Assign lower priority numbers to the more-specific rules. This ensures the Break-in-Service process enforces those rules first.

**Note:** You must ensure the best match has the lower priority. Once an employee is processed, they're ignored for subsequent rows, even if they meet those criteria.

To define the break-in-service rules for your organization:

1. Start the Manage Legal Entity HCM Information task from your implementation project
2. Open your legal entity for editing.
3. Under **Legal Employer**, click **Federal**.
4. In **ACA Break-in-Service Attributes**, click **Add Row**.

For each eligibility profile, you must define sufficient rows to capture all possible benefits restoration and restart outcomes.

5. Define the following.

Column header	What you do
Priority	<p>Set the order in which the Break-in-Service process evaluates the rehired employee.</p> <p>The process runs from lowest priority to highest. Set the priority order to align with the eligibility and row for each day range from lowest to highest.</p>
Eligibility Profile	<p>Select the ACA Eligibility profile for this priority. If all employees follow the same rules, leave this null.</p> <p>For further info, see Configure Benefits for Affordable Care Act Reporting in the Help Center.</p>
Break Days Greater Than or Equal  Break Days Less Than	<p>These two fields define the length of the break-in-service period for this benefits restoration outcome.</p> <p><b>Break Days Greater Than or Equal</b> represents the number of days since the person's termination.</p> <p>The value you enter for <b>Break Days Less Than</b> must be greater than or equal to the value for <b>Break Days Greater Than or Equal</b>.</p>
Service Greater Than or Equal to Break	<p>Select one:</p> <ul style="list-style-type: none"> <li>○ <b>Yes:</b> Employee's length of service immediately prior to the break is greater than or equal to the duration of the break.</li> <li>○ <b>No:</b> Length of service immediately prior to the break is less than the duration of the break.</li> <li>○ <b>Null:</b> Don't consider.</li> </ul>
Result	<p>For employees that meet these criteria, identify their ACA eligibility.</p> <ul style="list-style-type: none"> <li>○ <b>Restore:</b> Uses their eligibility prior to the break.</li> <li>○ <b>New Hire:</b> Treats them as a new hire.</li> </ul>
Assignment ACA Field Start Date	<p>If you selected the <b>Restore</b> result, select when their restored eligibility begins.</p> <ul style="list-style-type: none"> <li>○ <b>First of month:</b> First day of the month following the date of hire.</li> <li>○ <b>Hire date:</b> Date of employee rehire.</li> <li>○ <b>Start date of next pay period:</b> First payroll period start date following the date of rehire.</li> <li>○ <b>Start of pay period hire or next:</b> Rehire date if the same as a pay period start date, else the next pay period start date.</li> <li>○ <b>Start of month hire or next:</b> Rehire date if the same as the first day of the month, else the first day of the month following date of hire.</li> </ul>

6. Save your work.

7. Repeat until you've defined sufficient rows to capture all possible benefits restoration and restart outcomes for every eligibility profile.

## How to Configure Your Legal Reporting Units

### How to Configure Legal Reporting Units for Affordable Care Act Reporting

Your legal reporting units (LRUs) require the following configuration.

- Identify your reporting establishments
- Configure your tax reporting units

### How to Identify Reporting Establishments for ACA Reporting

For the **Human Resources or None** extension, you perform your Affordable Care Act (ACA) reporting at the tax reporting unit (TRU) level, and you must have your employees associated with a reporting establishment.

To identify a legal reporting unit (LRU) as a reporting establishment:

1. From **My Client Groups**, click **Workforce Structures**.
2. In **Organizations**, click **Manage Legal Reporting Unit HCM Information**.
3. In **Manage Legal Reporting Unit HCM Information**, enter the LRU name and click **Search**.
4. Select the name in the search results, and click **Manage Legal Reporting Unit Classification**.
5. Select **Reporting Establishment**.
6. Click **Next**, and then review and submit.

### How to Configure Tax Reporting Units for ACA Reporting

You must perform this configuration on your tax reporting units (TRUs).

1. Make sure your TRUs and registrations are set up.  
Each TRU with a United States Federal Tax registration is considered a separate authoritative transmitter.
2. Verify your United States Federal Tax registrations.
  - a. From **My Client Groups**, click **Workforce Structures**.
  - b. In **Organizations**, click **Manage Legal Reporting Unit Registrations**.
  - c. Verify the following for the United States Federal Tax registration.

Field name	What reports use it
EIN or TIN	1094-C and 1095-C
Registered Address	1094-C and 1095-C

Field name	What reports use it
Registered Name	1094-C and 1095-C

3. Configure each TRU.

- a. From **My Client Groups**, click **Workforce Structures**.
- b. In **Organizations**, click **Manage Legal Reporting Unit HCM**.
- c. Click **Tax Reporting Unit** and then **Federal**.
- d. Enter the following in **ACA Reporting Information**.

Field name	What uses it	How it's used
ACA Contact First Name	1094-C	The 1094-C Employer Report flow requires this value on all TRUs.
ACA Contact Middle Name	1094-C	The 1094-C Employer Report flow requires this value on all TRUs.
ACA Contact Last Name	1094-C	The 1094-C Employer Report flow requires this value on all TRUs.
ACA Contact Suffix	1094-C	The 1094-C Employer Report flow requires this value on all TRUs.
ACA Contact Phone	1094-C and 1095-C	The 1094-C Employer Report flow requires this value on all TRUs.  Enter the full number as digits, including country code.
Qualifying Offer Method	1094-C	The 1094-C Employer Report flow requires this value on all TRUs.
Qualifying Offer Method Transition Relief	1094-C	No longer used as of the 2016 reporting period.
98 Percent Offer Method	1094-C	The 1094-C Employer Report flow requires this value on all TRUs.
Safe Harbor	1094-C	Overrides line 16 for all employees associated with this TRU.

Field name	What uses it	How it's used
Minimum Coverage Offered All 12 Months	1094-C	The 1094-C Employer Report flow requires this value on all TRUs.
Employee Count Date to Use	1094-C	The 1094-C Employer Report flow supports only the last day of the month.
Calculation Date	1094-C and 1095-C	Defines the milestone day of the month for employee coverage.
Calculation Day	1094-C and 1095-C	This field is available only if you selected <b>Given day</b> for <b>Calculation Date</b> .  If the current month has fewer days than the value you selected, the report treats this as <b>Last day of the month</b> .
Grant full coverage for partial month	1094-C and 1095-C	When selected, the report considers employees hired or terminated midmonth covered for the full month.

e. Enter the following in **ACA Aggregated Group Information**.

For a definition of ALE member (ALEM), see the IRS instructions.

Field name	What uses it	How it's used
Aggregated ALE Group Member	1094-C	Select <b>Yes</b> if you're an aggregated applicable large employer (ALE) group employer.
Aggregated ALE Group Name	1094-C	If this TRU is an aggregated ALE group member, select the group name.  Used to group employers for reporting.

For example, TRU A is the parent of TRU B and TRU C. Combined, A, B, and C have 55 full-time employees. The three collective TRUs represent one ALE. The Form 1094-C refers to the same concept as the aggregated ALE group.

- i. For TRU A, you set **Aggregated ALE Group Member** to **Yes**. Its TRU name now appears in **Aggregated ALE Group Name**.
- ii. For TRUs B and C, you set **Aggregated ALE Group Member** to **No**.

- iii. Select TRU A's name for **Aggregated ALE Group Name**.
  - iv. Leave these fields blank for any TRU reporting separately.
4. Save your changes.

# How to Configure Oracle Fusion Cloud Human Resources Benefits

## How to Configure Benefits for Affordable Care Act Reporting

You must configure the following on Oracle Fusion Cloud Human Resources Benefits.

- Each benefits plan or program
- Affordable Care Act (ACA) eligibility profiles

## How to Configure Your Benefits Plans and Programs for ACA Reporting

You can define benefit plans specific to the Affordable Care Act (ACA) or use qualifying existing plans.

Set the following for each plan.

What you need to do	How you do it
Define the minimum essential coverage and minimum value	For each plan or program: <ol style="list-style-type: none"> <li>1. Determine if the plan meets minimum essential coverage and minimum value requirements according to the ACA.  For further info, see your benefits supplier documentation.</li> <li>2. If so, start the Benefit Plan Details task and click <b>Plan</b>.</li> <li>3. Search for and select the plan.</li> <li>4. Navigate to <b>Additional Configuration</b>.</li> <li>5. Select <b>Yes</b> for the following.                             <ul style="list-style-type: none"> <li>○ Minimum Essential Coverage</li> <li>○ Minimum Essential Coverage</li> </ul> </li> </ol>
Set the primary funding method	To self-fund your benefits: <ol style="list-style-type: none"> <li>1. Start the Benefit Plan Details task, and click <b>Plan</b>.</li> <li>2. Search for and select your plan.</li> <li>3. Navigate to <b>Additional Configuration</b>.</li> <li>4. Select the <b>Self-insured</b> primary funding method.</li> </ol> <p>Set this value at the program or plan level, depending on your program configuration.</p>

What you need to do	How you do it
Set the lowest cost option	<p>When adding an option to a plan, to designate it as the lowest cost option:</p> <ol style="list-style-type: none"> <li>1. Start the Benefit Plan Details task, and click <b>Plan</b>.</li> <li>2. Search for and select your plan.</li> <li>3. In the <b>Option</b> region of <b>Basic Details</b>, edit an existing option or create one.</li> <li>4. In <b>Select and Add</b>, select <b>Yes</b> for <b>Minimum Value</b>.</li> </ol> <p>Ensure that you designate only one option as the lowest cost option.</p>

**Note:** These are the minimum instructions for configuring benefits for ACA compliance. For further info, see the Oracle Global Human Resources Cloud Implementing Benefits guide on the Help Center.

## How to Configure ACA Eligibility Profiles

An Affordable Care Act (ACA) eligibility profile is associated with an ACA eligibility. When you run the ACA Eligibility Process flow, it:

1. Assigns the appropriate eligibility to employees belonging to that profile.
2. Updates the ACA fields on the employee assignments.

You must define a profile for each ACA eligibility you support in your organization, and you must ensure all employees belong to one of them. Available eligibilities are:

ACA eligibility	What it means
Always	Person is always eligible for benefits.
Exclude	Person is excluded from eligibility evaluation. You are determining their eligibility elsewhere.
Never	Person is never eligible.
No-monthly	<p>Person is an hourly employee who is initially ineligible for benefits at time of hire. Their eligibility is reevaluated at the end of a monthly measurement period.</p> <p>For example, if an employee is hired as <b>No-monthly</b>, but they work full-time hours after their initial measurement period, they would become <b>Yes-monthly</b>.</p>
No-weekly	Person is an hourly employee who is initially ineligible for benefits at time of hire. Their eligibility is reevaluated at the end of a weekly measurement period.
Yes-monthly	Person is an hourly employee who is initially eligible for benefits at time of hire. Their eligibility is reevaluated at the end of a monthly measurement period.
Yes-weekly	Person is an hourly employee who is initially eligible for benefits at time of hire. Their eligibility is reevaluated at the end of a weekly measurement period.

To define an eligibility profile:

1. From **Benefits**, click **Eligibility Profiles**.
2. Select **Create**, and click **Create Participant Profile**.
3. Set the following.

Field name	What you do
Name	Provide a meaningful name for the profile.
Description	Provide any additional info on the profile.
Assignment to Use	Select <b>Primary employee assignment only - legal employer</b> .
Profile Usage	Select <b>Benefits</b> .
Status	Select <b>Active</b> .

4. Use the tabs under **Eligibility Criteria** to define general employee eligibility rules.

Each tab offers different kinds of eligibility criteria.

An employee is considered eligible if they meet the criteria on at least one.

5. Use the **Legal Entities** tab if you have multiple legal employers, and you want to define different eligibility for each.
6. Once you defined the criteria for your general employee population, you can define rules that set eligibility for specific employees.

To grant eligibility to an employee that doesn't already meet the eligibility criteria, include them on the profile.

**Note:** You can also set their eligibility directly on their assignment. However, running the ACA Eligibility Process flow clears these overrides, so you must set their eligibility to **Exclude**.

To exclude employees, you have two options.

- o Exclude their assignment category from the eligibility profile.
  - i. Under **Eligibility Criteria**, click **Employment**.
  - ii. Click **Assignment Category**.
  - iii. Click **Exclude** for the assignment category.
- o Add them to an exclusion profile.

7. Save your changes.

## How to Configure Employees

### What are the employee requirements for Affordable Care Act reporting?

Each employee must have the following updated as of the first month they are reported.

- Complete work hours
- HR assignment and payroll relationship

### How to Load Employee Hours for ACA Reporting

For your first reporting period, ensure you have loaded all work hours for your employees.

Use HCM Data Loader (HDL) to load the hours of employees who:

1. Were hired in the year prior to when you went live
2. Require average hours worked to be determined at the end of each measurement period

### How to Load Employee Assignment History for ACA Reporting

If your Oracle Cloud implementation date occurred mid-year, use HCM Data Loader (HDL) to ensure each active employee has a valid assignment history for the entire year. Set their ACA Eligibility fields effective as of the day before you went live.

Use HDL to update the ACA fields for all employee active primary employment records. This info must be available for the entire reporting period (calendar year), including date effective changes.

### How to Configure Individual Employee Assignments for ACA Reporting

To manually configure an employee's assignment for Affordable Care Act (ACA) reporting:

1. Start the Employment task for the person.
2. Click **Edit**.
3. In **Job Details**, under **Assignment Details**, update the following as needed.

Field name	What uses it	How it's used
Reporting Establishment	1094-C and 1095-C	Required for nonpayroll implementations.

Field name	What uses it	How it's used
ACA Eligibility	Not used	Identifies the employee ACA eligibility. <ul style="list-style-type: none"> <li>○ Always</li> <li>○ Exclude</li> <li>○ Never</li> <li>○ No-monthly</li> <li>○ No-weekly</li> <li>○ Yes-monthly</li> <li>○ Yes-weekly</li> </ul>
ACA Full Time	1094-C and 1095-C	Select <b>Yes</b> for eligible employees in a stability period.
Limited Nonassessment Period	1094-C and 1095-C	Used to derive 1095-C line 16 value 2D. <ul style="list-style-type: none"> <li>○ Select <b>Yes</b> for the period when employee is in a measurement or administrative period, but not in stability period.</li> <li>○ Change to <b>No</b> once the stability period starts.</li> </ul>
Measurement Period Start Date Measurement Period End Date	Not used	Identify the measurement period.
Administrative Period Start Date Administrative Period End Date	Not used	Identify the administrative period.
Stability Period Start Date Stability Period End Date	Not used	Identify the stability period.
Safe Harbor Override	1094-C and 1095-C	Identifies if the employee is currently in a Safe Harbor situation.
Affordable HRA Offered	1094-C and 1095-C	Indicates the employer has offered affordable Health Reimbursement Arrangement (HRA) to this person.  This overrides the setting at the legal entity level. For further info, see Configure Legal

Field name	What uses it	How it's used
		Entities for Affordable Care Act Reporting in the Help Center.
HRA Affordability ZIP Code	1094-C and 1095-C	ZIP Code used to determine employee coverage.

## Add Employee Dependents for Affordable Care Act Reporting

For Affordable Care Act (ACA) reporting, you must add each employee's ACA dependents.

1. In **My Client Groups**, click **Person Management**.
2. Search for and select the employee.
3. Start the Person task.
4. Search for and select the person.
5. Click **Contacts**.
6. Click **Create**.
7. In **Relationship Information**, enter the following.

Field name	What uses it	How it's used
Benefits Offered Conditionally	1094-C and 1095-C	Select <b>Yes</b> if you have conditionally offered ACA qualified benefits to the employee's spouse.
Contact Type	1095-C	Identifies the relationship the employee has with this contact.
Effective Start Date	1095-C	Date this person becomes a contact.
Emergency Contact	1095-C	Identifies this person as an emergency contact for your employee.
TIN Type	1094-C and 1095-C	Select individual taxpayer identification number (TIN) or social security number (SSN).
TIN Number	1094-C and 1095-C	Optional if you provide a date-of-birth in the next section.

8. In **Personal Info**, enter the following.

Field name	What uses it	How it's used
Last Name	1095-C	
Date of Birth	1094-C and 1095-C	

9. Click **OK**.

## How to Configure Balances

### How to Define Balance Feeds for Affordable Care Act Employee Eligible Hours

When configuring your balances for Affordable Care Act (ACA) eligible hours calculation, the steps you take depend on your license type.

- Payroll customers must use balances.
- HR-Only customers must use element entry.

Neither solution works for both.

#### What to do if you're a Cloud Payroll customer

Define feeds for the ACA Eligible Employee Hours balance.

1. Start the Balance Definitions task.
2. Select your legislative data group (LDG), and search for **ACA**.
3. Select **ACA Eligible Employee Hours** in the search results.
4. Click **Balance Feeds**.
5. Feed this balance to all qualifying Hours Worked elements.

Select their **Hours** input value.

**Note:** The predefined ACA Eligible Employee Hours balance tracks values up to three decimal places, so the feeds you define must be three decimal places.

#### What to do if you're not a Cloud Payroll customer

You must define Information elements to track the hours worked for variable-hour employees.

1. Use the Elements task to define Information elements for each earning type.

Depending on your organization, this can include:

- Regular pay

- Overtime pay
  - Jury duty
  - Vacation
2. Identify the elements as nonrecurring.
  3. Add these elements with the eligible hours for the measurement period to element entry.  
 Be sure the element end date is within the measurement period start and end dates.
  4. Create an **Hours** element input value of with these values.
    - Unit of Measure  
 Hours in decimal format, 3 places
    - Displayed
    - Allow User Entry
  5. Feed the predefined ACA Employee Eligible Hours balance using the **Hours** input value from all qualifying Hours Worked elements.

## How to Configure the ACA Forms

### Configure the 1094-C Transmission Manifest

Before you can submit your Affordable Care Act (ACA) info to the IRS, you need to update your Form 1094-C transmission manifest.

Use a standard text editor to set these values.

- Unique transmission ID
- Checksum number
- Attachment byte size

For further info, see the following sections.

#### How you update the unique transmission ID

The XML schemas for Forms 1094-C and 1095-C include elements designed to uniquely identify ACA Information Returns (AIR) transmissions, submissions within the transmission, and records within the submission. The transmitter that generates the form data file for transmission to the IRS must generate these IDs and maintain them along with their associated transmissions. They use unique IDs to simplify and increase the precision of communications, corrections, and replacements.

The transmitter uniquely identifies each transmission by the unique transmission identifier (UTID) in the header.

The format for the UTID includes these fields separated by colons.

Field	What it does
UUID	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. In

Field	What it does
	<p>its canonical form, a UUID is represented by 32 hexadecimal digits, displayed in five groups separated by hyphens. It uses the form 8-4-4-4-12 for a total of 36 characters (32 digits and 4 hyphens).</p> <p>For example: 550e8400-e29b-41d4-a716-44665540000</p> <ol style="list-style-type: none"> <li>1. Use an online UUID generator to create this value, such as the Online UUID Generator.</li> <li>2. Open the Manifest file in a text editor, and enter the UUID you created.</li> </ol> <p>Don't change the rest of the data in that line.</p>
Application ID	SYS12
Transmitter Control Code	5-character alphanumeric all-capital string that contains the transmitter's control code (TCC). Specify the TCC the IRS assigned the transmitter when you applied to file electronically.
Reserved	Empty field.
Request type	Must be <b>T</b> (Transactional).

### How you set the checksum

Use an online checksum generator, such as OnlineMD5, to create a checksum number of SHA-256 type and then apply it to the manifest file. For further info, see Overview of Affordable Care Act Reporting in the Help Center.

After you have the checksum number, open manifest file in a text editor and enter the number.

### How you set the attachment byte size

From File Explorer, right-click on the 1094-C form data file, and select **Properties**. Enter the file's size in bytes in the `<irs:AttachmentByteSizeNum>` tag of the manifest file.

## Configure the Form 1095-C Template

When preparing to print Form 1095-C, you have a couple configuration options.

- Print using ComplyRight paper stock with preprinted instructions
- Mask Social Security Numbers (SSNs)

### If you're using ComplyRight paper stock

If you're using ComplyRight plain white paper stock with preprinted instructions, you must edit the predefined template to remove the instructions.

1. Configure the 1095-C template.
  - a. From **Tools**, click **Reports and Analytics**.
  - b. Click **>>**, and select **Shared Folders**.
  - c. Expand **Human Capital Management, Benefits, US**, and then **ACA**.
  - d. Click **Edit** for the 1095-C template.

- The print folder is **1095c**, and the template is **1095c\_print\_YYYY**.
- The online folder is **US1095c**, and the template is **1095c\_online\_YYYY**.

Where **YYYY** is the reporting year.

- e. Click **Edit** for the selected template.

This downloads the template as an RTF file. Save it to an appropriate location.

- f. Open the file in a text editor, such as Microsoft Word.
- g. On the second page, navigate to the `count CoveredIndividualGrp` entry.
- h. Move it to after the `PrintInstructionsEP` entry on the first page.
- i. Delete the page that provides the instructions.
- j. Confirm that Page 3 has changed to Page 2.
- k. Save the template with a new name.

2. Upload the template.

- a. From **Reports and Analytics**, click **>>** and select **Shared Folders**.
- b. Expand **Custom, Human Capital Management, Payroll, Regulatory and Tax Reporting, US**, and then **Year End**.
- c. Select **+Add New Layout**.
- d. In **Upload or Generate Layout**, click **Upload**.
- e. In **Upload Template File**, enter or select the following.

Field name	What you do
Layout Name	Enter a memorable name.
Template File	Select the file you just saved.
Type	Select <b>RTF Template</b> .
Locale	Select <b>English</b> .

- f. Click **Upload**.

## If you need to mask Social Security Numbers

You mask social security numbers (SSNs) on Form 1095-C with **Mask Social Security Number on ACA Form** at the legislative data group (LDG), payroll statutory unit (PSU), and tax reporting unit (TRU) levels. The effective date for this field determines how the report displays SSNs in the reporting year.

**Note:** SSNs aren't masked on Form 1094-C.

Employee social security numbers (SSNs) are masked on Form 1095-C based on this hierarchy.

LDG	PSU	TRU	What SSNs are masked
No	Null	Null	None
No	Yes	Null	Only SSNs on the PSU
No	Null	Yes	Only SSNs on the TRU
Yes	Null	Null	All
Yes	No	Null	All except SSNs on the PSU
Yes	Null	No	All except SSNs on the TRU

## Other Configuration

### State-Specific Configuration for Affordable Care Act Reporting

Because the ACA reporting flow pattern includes support for files in state-specific formats, you must perform additional configuration for some states before you can generate your Affordable Care Act (ACA) reports.

For this state	Do this
California	Enroll for the Minimum Essential Coverage Information Reporting (MEC IR) program. For further info, see the State of California Franchise Tax Board website.
New Jersey	Register for a Division of Revenue and Enterprise Services (DORES) account. For further info, see the New Jersey Treasury website.
Rhode Island	In addition to submitting through the ACA Information Returns (AIR) electronic filing system, you must submit the 1094-C Employer Report electronically to the Rhode Island Division of Taxation. For further info, see the State of Rhode Island Division of Taxation Department of Revenue website.
Washington DC	In addition to submitting through the AIR electronic filing system, you must submit the 1094-C Employer Report electronically with the Office of Tax and Revenue (OTR). For further info, see the Washington DC Office of Tax and Revenue website.

## Affordable Care Act Information Returns System

Your only option for submitting your federal Affordable Care Act (ACA) reports is through the ACA Information Returns (AIR) electronic filing system. Your ACA transmitters must submit the form data files through the ISS-UI channel.

For further info, refer to the IRS documentation.

If this is your first time filing through AIR, perform these steps.

1. Register your responsible officials and contacts with IRS e-Services.
2. Apply for a transmitter control code (TCC). For further info, refer to the IRS website.
3. Complete an error-free communication test in XML format.

You must submit predefined test scenario 3, 4, or 5 to complete an error-free communication test in XML format. To receive sample scenario 1094-C test files for AATS testing, you must submit a Service Request with Oracle Support.

- Service Type: Oracle Fusion Global Human Resources Cloud Service
- Problem Type: Country/Region Legislation > Americas

# 3 How to Perform Affordable Care Act Reporting

## Overview of Affordable Care Act Reporting

Use the reports and processes provided by Oracle to generate and submit your annual Affordable Care Act (ACA) forms.

**Note:** Oracle Fusion HCM doesn't support Consolidated Omnibus Budget Reconciliation Act (COBRA) ACA reporting. ACA reporting isn't supported for retirees.

Follow these steps to generate and submit your ACA forms to the IRS.

What you do	Check here for more info
Make sure your organization and person info are up-to-date.	<ul style="list-style-type: none"> <li><a href="#">Configure Legal Entities for Affordable Care Act Reporting</a></li> <li><a href="#">How to Configure Legal Reporting Units for Affordable Care Act Reporting</a></li> <li><a href="#">How to Configure Benefits for Affordable Care Act Reporting</a></li> <li><a href="#">What are the employee requirements for Affordable Care Act reporting?</a></li> </ul>
Check your employees' assignments for ACA eligibility, and make necessary updates.	<a href="#">Identify and Update Assignments for ACA Reporting</a>
Run the ACA year-end archive.	<a href="#">How to Archive Your End-of-Year Affordable Care Act Info</a>
Review the audit report to evaluate the archived data.	<a href="#">How to Review the End-of-Year ACA Archive Audit Report</a>
Fix the info reported by the audit report.	<a href="#">How to Correct Affordable Care Act Info</a>
Rerun the archive if needed.	
Generate Form 1095-C, and check your results.	<a href="#">How to Generate Form 1095-C and View the Results</a>
Generate the Form 1094-C, and submit it.	<a href="#">How to Generate the Form 1094-C Electronic Data File</a>
Make changes to the manifest file as needed and submit it.	<a href="#">How to Configure the 1094-C Manifest File and Submit Your Data</a>

What you do	Check here for more info
	<p><b>Note:</b>                      Before submission, you must be registered with the ACA Information Returns (AIR) electronic filing system. For further info, see <a href="#">Affordable Care Act Information Returns System</a>.</p>

## Identify and Update Assignments for ACA Reporting

As part of your ACA reporting, you must regularly review your employees' eligibility and update their assignments appropriately.

### Before you begin

Be sure you have completed all ACA reporting configuration steps. For further info, see [Overview of Affordable Care Act Reporting](#).

### If this is your first reporting year

If you implemented Oracle Cloud during this reporting year, make sure your employees' hours worked balances for the entire year are available to the ACA reporting processes. For employees experiencing an eligibility change during the reporting year, you must also have their hours worked balances for the prior year.

The payroll process automatically captures this info during the payroll run, but you must make sure you uploaded the legacy hours-worked data before your implementation.

1. Perform a balance initialization for the ACA Employee Eligible Hours balance as of the first month of the lookback period.  
 For further info, see Oracle Cloud Human Capital Management for the United States: Balance Initialization (1912298.1) on My Oracle Support.
2. Perform balance adjustments for the subsequent months before your first Oracle Cloud payroll run.  
 For further info, see Oracle Cloud Human Capital Management for the United States: Balance Adjustments (1600728.1) on My Oracle Support.

**Note:** You don't specify a balance dimension. Elements are loaded as of a specific date during the balance initialization and adjustments.

## How to identify and update assignments

There are two methods for evaluating and updating employee assignments.

Method	What it does
ACA Eligibility Process	This evaluates each employee to determine their eligibility and then updates their ACA assignment fields appropriately. Running it weekly is recommended and monthly at the minimum.

Method	What it does
	For further info, see <a href="#">ACA Eligibility Process</a> .  <b>Note:</b> You can set initial values for most of these fields through the Employment task.  This process doesn't update the <b>Reporting Establishment</b> or <b>Safe Harbor</b> fields.
HCM Data Loader (HDL)	Perform a mass upload of the ACA legislative flex fields using HDL. Do this for cases like: <ul style="list-style-type: none"> <li>You have employees that were on-boarded due to a merger or acquisition, and you don't want their hire date to follow the eligibility processing logic.</li> <li>You want to update the ACA fields for employees that were excluded from the ACA Eligibility Process.</li> </ul>

To update your employees' ACA eligibility with the ACA Eligibility Process:

1. Run this flow in Draft mode.  
 When running the process at the end of the calendar year, you must set the end date to December 31 to ensure the process applies the year correctly. You would then perform the next run with a January 1 start date.
2. Audit the proposed updates.  
 To review the process's output file:
  - a. Start the Person Process Results task.
  - b. Click the process name's link.
  - c. In **Output and Log Files**, open the **US ACA Eligibility.txt** file.
3. Use the Employment task to make any necessary changes.  
 For further info, see [Configure for Affordable Care Act Reporting](#) in the Help Center.
4. Run the process again in Final mode. This applies the actual assignment updates.  
 The type of assignment update depends on the effective date of the change.
  - o **Correct:** Last assignment start date is the same as the effective date from the process.
  - o **Update:** Process effective date is later than the last assignment start date.
  - o **Update Insert:** Process assignment update date is later than the current assignment but prior to a future-dated assignment change.

## How to Archive Your End-of-Year Affordable Care Act Info

The Archive End-of-Year ACA Information extract picks all employees who have an active assignment during the calendar year.

1. If you have already run the archive for this reporting year, roll back the flow before running the archive again.

- This makes sure you have the latest software updates and are including all corrections to historical data.
2. Run the Archive End-of-Year ACA Information extract from the Submit a Flow task.  
For further info, see [Archive End-of-Year ACA Info](#).
  3. Click **Submit**.

## How to Review the End-of-Year ACA Archive Audit Report

The End-of-Year Affordable Care Act archive generates audit reports for the 1094-C and 1095-C reports.

To view these reports:

1. When the flow completes, click **Archive End-of-Year ACA Information** in **Tasks**.
2. In **Person Process Results**, view the employees processed.
3. In **Output and Log Files**, select the file to view.
  - o 1094Audit.txt
  - o 1095Audit.txt
4. Click **Download**.
5. Save the audit report as a .csv file, and open it in a spreadsheet application, such as Microsoft Excel.
6. Review the audit report.
7. If you find any discrepancies, continue with [How You Fix Your ACA Info](#).  
Otherwise, you can skip to [How You Generate Form 1095-C and View the Results](#).

## How to Correct Affordable Care Act Info

After you have run the Archive End-of-Year ACA flow, use the audit report to evaluate the archived data. If anything is incorrect, use the ACA Override Upload task to correct it.

For further info, see [ACA Override Upload](#).

Fields that often need fixing are:

- Coverage information values for employees
- Employee share of lowest cost
- Offer of Coverage
- Section 4980H Safe Harbor and Other Relief - Code 2C

To set overrides for your employees' ACA values:

1. Roll back the Archive End-of-Year ACA Information flow if you have already run it for this calendar year.
2. Start the Person Data Loader task.
3. Start the ACA Override Upload task.
  - a. From **Benefits Administration**, click **Evaluation and Reporting**.
  - b. Click **Person Data Loaders**.

c. Click **Go to Task** for the ACA Override Upload task.

It opens a Microsoft Excel spreadsheet where you can enter the overrides.

4. Specify values for the following.

Field name	What you enter
Effective Date	Enter the last day of the reporting year, such as 12/31/2017 for 2017.
Changed	Populated automatically.
Status	Populated automatically.
Person Number	Enter the person number of the employee requiring the change.
Participant First Name	Enter the first name of the employee.
Participant Last Name	Enter the last name of the employee.
Contact First Name	If you select <b>Covered Individuals - Dependent</b> for <b>ACA Report Line Number</b> below, enter the contact person's first name.  If not, leave blank.
Legal Entity	Select the appropriate legal entity name.
ACA Report Line Number	The line corresponding to the value you're overriding. Create a separate row for each value you're overriding.  For example, use Line 14 to override the Offer of Coverage and Line 15 to override the Employee share of lowest cost. To enter overrides for both, you would create 2 rows for the same employee: <ul style="list-style-type: none"> <li>○ <b>Offer of Coverage</b></li> <li>○ <b>Employee share of lowest cost</b></li> </ul> For Line 14, <b>Offer of Coverage</b> , valid values are: <ul style="list-style-type: none"> <li>○ 1A</li> <li>○ 1B</li> <li>○ 1C</li> <li>○ 1D</li> <li>○ 1E</li> </ul>

Field name	What you enter
	<ul style="list-style-type: none"> <li>○ 1F</li> <li>○ 1H</li> <li>○ 1I</li> <li>○ 1J</li> <li>○ 1K</li> <li>○ 1L</li> <li>○ 1M</li> <li>○ 1N</li> <li>○ 1O</li> <li>○ 1P</li> <li>○ 1Q</li> <li>○ 1R</li> <li>○ 1S</li> <li>○ 1T</li> <li>○ 1U</li> <li>○ 1V Reserved for future use</li> <li>○ 1W Reserved for future use</li> <li>○ 1X Reserved for future use</li> <li>○ 1Y Reserved for future use</li> <li>○ 1Z Reserved for future use</li> </ul> <p>For Line 15, <b>Employee share of lowest cost</b>, the valid value can be any positive number with decimals, such as 10.5. If the value is the same for the whole year, then select <b>All 12 Months</b>.</p> <p>For Line 16, <b>Section 4980H Safe Harbor and Other Relief</b>, the valid value is <b>2C</b>.</p> <p>For Line 17, <b>ZIP Code</b>, enter an applicable ZIP Code to use to determine affordability. Do this if you have offered the employee individual Health Reimbursement Account (HRA) coverage.</p> <p>For Lines 18 through 22, <b>Covered Individuals - Dependent</b> and <b>Covered Individuals - Employee</b>, valid values are <b>Y</b> or <b>N</b>.</p>
Year	Enter the reporting year. This must be the same year that you ran the archive against.
January through December	Use these fields to enter overrides for specific months.  You must provide a value for every month. If you don't enter an override, the report uses the value provided by the ACA Archival Process.

Field name	What you enter
	<p><b>Note:</b>                      If the value for Line 15 is the same for all 12 months, you don't need to set an override for each month.</p>
Override Reason	Enter an optional reason.
Delete	<p>Select <b>No</b> to save the override values in the spreadsheet.</p> <p>Select <b>Yes</b> to remove any previous overrides for the employee.</p>
Flagged	Populated automatically.
Key	Populated automatically.

5. Click **Upload** to apply the changes.
6. Run the Archive End-of-Year ACA Information flow to capture your changes.  
 For further info, see [How to Archive Your End-of-Year Affordable Care Act Info](#).

## How to Generate Form 1095-C and View the Results

To generate the Forms 1095-C from archived data and distribute them to your employees:

1. Run the US 1095-C Employee Report flow.
  - a. From **My Client Groups**, click **Payroll**.
  - b. Click **Submit a Flow**.
  - c. Select your US legislative data group (LDG).
  - d. Search for and select **US 1095-C Employee Report**.
  - e. Enter the required info, and click **Submit**.

For further info, see [US 1095-C Employee Report](#).
2. View the generated output file.
  - a. When the flow completes, click **US 1095-C Employee Report** in **Tasks**.
  - b. In **Person Process Results**, view the employees processed.
  - c. In **Output and Log Files**, select the file to view.
    - i. 1095C.pdf
  - d. Select **Download**.
  - e. Review the report.
  - f. If you find any discrepancies, see [How to Correct Affordable Care Act Info](#).

3. Use the output file to print your Forms 1095-C.

Use the settings on your printer to produce the required output.

- o Two pages, with the form on one page and instructions on another
- o As a two-sided form  
This requires a duplex printer.
- o On ComplyRight plain white paper stock with instructions on the back, form L1095CBLK500  
Because this stock already includes the instructions, you must edit the 1095-C template to remove them from the print.

**Note:** You can use a standard business #10-C envelope for mailing.

## How to Generate the Form 1094-C Electronic Data File

To generate your employer Form 1094-C electronic data file and submit it to the IRS:

1. Run the US 1094-C Employer Report flow.
  - a. From My Client Groups, click **Payroll**.
  - b. Click **Submit a Flow**.
  - c. Select your US LDG.
  - d. Search for and select **US 1094-C Employer Report**.
  - e. Enter the required info, and click **Submit**.

For further info, see [US 1094-C Employer Report](#).

2. View the generated output file.
  - a. When the flow completes, click **US 1094-C Employer Report** in **Tasks**.
  - b. In **Person Process Results**, view the employees processed.
  - c. In **Output and Log Files**, select the file to view.
    - 1094C.xml
    - Manifest 1094C.xml
  - d. Select **Download**.
  - e. Review the reports.
  - f. If you find any discrepancies, see [How to Correct Affordable Care Act Info](#).

## How to Configure the 1094-C Manifest File and Submit Your Data

The Manifest file contains the ACA business header and request manifest details.

1. Update the following in the manifest file.

- UniqueTransmissionId
- ChecksumAugmentationNum
- AttachmentByteSizeNum

For further info, see *Configure the 1094-C Transmission Manifest*.

2. Use the AIR electronic filing system to transmit your ACA data to the IRS. This involves uploading the information returns to the channel as XML files through your ACA transmitter's Web browser.

For further info, see *Affordable Care Act Information Returns System*.



# 4 How ACA Reporting Works

## How the ACA Flows Obtain Their Info

The info the Affordable Care Act (ACA) flows use to populate your Forms 1094-C and 1095-C come from multiple sources.

### Form 1094-C

The Form 1094-C electronic XML file reports your employer info as well as the related 1095-C info.

#### PART I

This section provides info on the form's ALE (Applicable Large Employer) member.

Form line	Form label	Where you set it
1	Name of ALE Member (Employer)	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Name</b></li> </ol>
2	Employer identification number (EIN)	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>EIN or TIN</b></li> </ol>
3	Street address	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task, United States Federal Tax jurisdiction, <b>Registered Address</b></li> </ol>
4	City or town	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
5	State or province	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
6	Country and ZIP or foreign postal code	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
7	Name of person to contact	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. <b>Tax Reporting Unit</b></li> <li>3. <b>Federal</b></li> <li>4. <b>ACA Reporting Information</b> <ul style="list-style-type: none"> <li>○ <b>ACA Contact First Name</b></li> <li>○ <b>ACA Contact Middle Name</b></li> <li>○ <b>ACA Contact Last Name</b></li> </ul> </li> </ol>

Form line	Form label	Where you set it
8	Contact telephone number	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. <b>Tax Reporting Unit</b></li> <li>3. <b>Federal</b></li> <li>4. <b>ACA Reporting Information</b></li> <li>5. <b>ACA Contact Phone</b></li> </ol>
9	Name of Designated Government Entity	Designated Government Entities (DGEs) aren't supported
10	Employer Identification Number (EIN)	DGEs aren't supported
11	Street address	DGEs aren't supported
12	City or town	DGEs aren't supported
13	State or province	DGEs aren't supported
14	Country and ZIP or foreign postal code	DGEs aren't supported
15	Name of person to contact	DGEs aren't supported
16	Contact telephone number	DGEs aren't supported
18	Total number of Forms 1095-C submitted with this transmittal	Value is derived by the report flow

## PART II

This section collects ALE member (ALEM) info.

Form line	Form label	Where you set it
19	Is this the authoritative transmittal for this ALE Member?	Value is derived by the report flow
20	Total number of Forms 1095-C filed by or on behalf of ALE Member	Value is derived by the report flow
21	Is ALE Member a member of an Aggregated ALE Group?	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. <b>Tax Reporting Unit</b></li> <li>3. <b>Federal</b></li> <li>4. <b>ACA Aggregated Group Information</b></li> <li>5. <b>Aggregated ALE Group Member</b></li> </ol>

Form line	Form label	Where you set it
22	Certifications of Eligibility	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. <b>Tax Reporting Unit</b></li> <li>3. <b>Federal</b></li> <li>4. <b>ACA Reporting Information</b> <ul style="list-style-type: none"> <li>o <b>Qualifying Offer Method</b></li> <li>o <b>98 Percent Offer Method</b></li> </ul> </li> </ol>

### PART III

Part III reports the following for the ALEM.

- Minimum essential coverage offered by the ALEM to full-time employees
- Full-time employee count
- Total employee count

Form line	Form label	Where you set it
23 (a)	Minimum Essential Coverage Offer Indicator	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. <b>Tax Reporting Unit</b></li> <li>3. <b>Federal</b></li> <li>4. <b>ACA Reporting Information</b></li> <li>5. <b>Minimum Coverage Offered All 12 Months</b></li> </ol>
23 (b)	Full-Time Employee Count for ALE Member	Value is derived by the report flow
23 (c)	Total Employee Count for ALE Member	Value is derived by the report flow
23 (d)	Aggregated Group Indicator	Value is derived by the report flow
24 - 35 (a - d)	Minimum Essential Coverage Offer Indicator	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. <b>Tax Reporting Unit</b></li> <li>3. <b>Federal</b></li> <li>4. <b>ACA Reporting Information</b></li> <li>5. <b>Minimum Coverage Offered All 12 Months</b></li> </ol>

### PART IV

Part IV lists all other members of the aggregated ALE group.

Form line	Form label	Where you set it
36 - 65	Name	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> </ol>

Form line	Form label	Where you set it
		2. United States Federal Tax jurisdiction 3. <b>Registered Name</b> <b>Note:</b> Applies to every TRU you identified as an aggregated ALE group member through <b>Aggregated ALE Group Member</b> .
	EIN	1. Legal Reporting Unit Registrations task 2. United States Federal Tax jurisdiction 3. <b>EIN or TIN</b> <b>Note:</b> Applies to every TRU you identified as an aggregated ALE group member through <b>Aggregated ALE Group Member</b> .

## Form 1095-C

This form reports info about your ALEs and the group health coverage they offer to your ACA full-time employees. You must provide Form 1095-C to your employees and file electronic copies, along with Form 1094-C (transmittal form), to the IRS.

Before generating this form, be sure you have:

1. Identified all ACA eligible full-time employees. Make sure you date-effectively update any changes to their status.
2. Identified which employees are in limited nonassessment periods. Make sure you date-effectively update any changes to their status.
3. Identified if you offer employer-sponsored self-insured health coverage in which the employee or other individual is enrolled.
4. Provided an SSN for all employees.
5. Provided at least one of the following for each employee dependent:
  - o SSN or TIN
  - o Date-of-birth

### PART I

Identifies info about you as the employer and your employees.

The employer details in Form 1095-C are the same as the employer details on the corresponding 1094-C transmittal file you send to the IRS.

Form line	Form label	Where you set it
1	Name of employee	1. Person task 2. <b>Person Information</b>

Form line	Form label	Where you set it
		<b>3. Name and Addresses</b> <ul style="list-style-type: none"> <li>○ Last Name</li> <li>○ First Name</li> </ul>
2	Social security number (SSN)	1. Person task 2. <b>Person Information</b> 3. <b>National Identifiers</b>
3	Street address	1. Person task 2. <b>Person Information</b> 3. <b>Name and Addresses</b> 4. <b>Address Line 1</b>
4	City or town	1. Person task 2. <b>Person Information</b> 3. <b>Name and Addresses</b> 4. <b>City</b>
5	State or province	1. Person task 2. <b>Person Information</b> 3. <b>Name and Addresses</b> 4. <b>State</b>
6	Country and ZIP Code or foreign postal code	1. Person task 2. <b>Person Information</b> 3. <b>Name and Addresses</b> <ul style="list-style-type: none"> <li>○ Country</li> <li>○ Postal Code</li> </ul>
7	Name of employer	1. Legal Reporting Unit Registrations task 2. United States Federal Tax jurisdiction 3. <b>Registered Name</b>
8	Employer identification number (EIN)	1. Legal Reporting Unit Registrations 2. United States Federal Tax jurisdiction 3. <b>EIN or TIN</b>
9	Street address	1. Legal Reporting Unit Registrations task 2. United States Federal Tax jurisdiction 3. <b>Registered Address</b>
10	Contact telephone number	1. Manage Legal Reporting Unit HCM Information 2. <b>Tax Reporting Unit</b> 3. <b>Federal</b> 4. <b>ACA Reporting Information</b> 5. <b>ACA Contact Phone</b>
11	City or town	1. Legal Reporting Unit Registrations task 2. United States Federal Tax jurisdiction 3. <b>Registered Address</b>
12	State or province	1. Legal Reporting Unit Registrations task

Form line	Form label	Where you set it
		2. United States Federal Tax jurisdiction 3. <b>Registered Address</b>
13	Country and ZIP Code or foreign postal code	1. Legal Reporting Unit Registrations task 2. United States Federal Tax jurisdiction 3. <b>Registered Address</b>

**PART II**

Reports info about your offer of group health coverage.

Form line	Form label	Where you set it
14	Offer of Coverage	<p>The report flow uses this hierarchy to determine the Offer of Coverage value.</p> <ol style="list-style-type: none"> <li>Checks for an override at the legal employer level.  For further info, see Configure for Affordable Care Act Reporting in the Help Center.</li> <li>Uses the ACA Override Upload process to check for an override.  For further info, see ACA Override Upload in the Help Center.</li> <li>Derives the value.</li> </ol> <p>Here's how the flows derive the various values.</p> <ul style="list-style-type: none"> <li>1A  Qualifying offer. Minimum essential coverage that provides minimum value. Available to full-time employees with:                             <ul style="list-style-type: none"> <li>Self-only coverage contributions equal to or less than 9.5% of the mainland single federal poverty line</li> <li>At least minimum essential coverage offered to their spouse and dependents</li> </ul> </li> </ul> <p><b>Note:</b> Set these on the legal entity:</p> <ul style="list-style-type: none"> <li>Mainland single federal poverty line: <b>Annual Poverty Level Value</b></li> <li>Mainland single federal percentage: <b>Annual Announced Percentage</b></li> </ul> <p>These fields are available in the Legal Entity HCM Information task in <b>Federal ACA Reporting Information</b>.</p>

Form line	Form label	Where you set it
		<ul style="list-style-type: none"> <li>• 1B                      Minimum essential coverage. Provides minimum value to the employee.</li> <li>• 1C                      Minimum essential coverage. Provides:                     <ul style="list-style-type: none"> <li>○ Minimum value to the employee</li> <li>○ At least minimum essential coverage to their dependents but not the spouse</li> </ul> </li> <li>• 1D                      Minimum essential coverage. Provides:                     <ul style="list-style-type: none"> <li>○ Minimum value offered to the employee</li> <li>○ At least minimum essential coverage offered to their spouse but not their dependents</li> </ul> </li> <li>• 1E                      Minimum essential coverage. Provides:                     <ul style="list-style-type: none"> <li>○ Minimum value to the employee</li> <li>○ At least minimum essential coverage offered to their dependents and spouse</li> </ul> </li> </ul> <p><b>Note:</b>                      The report flow checks the employees' contact info to derive the 1 series codes. To submit 1095-C forms to all ACA-eligible employees with 1E code, enter an override in Offer of Coverage Override Value at the Legal Employer level.</p> <p>For further info, see Configure for Affordable Care Act Reporting in the Help Center.</p> <ul style="list-style-type: none"> <li>• 1F                      Minimum essential coverage that doesn't provide minimum value to:                     <ul style="list-style-type: none"> <li>○ The employee</li> <li>○ The employee and their spouse or dependents</li> <li>○ The employee, their spouse, and their dependents</li> </ul> </li> </ul>

Form line	Form label	Where you set it
		<ul style="list-style-type: none"> <li>• 1G                             <p>Offer of coverage to employees that:</p> <ul style="list-style-type: none"> <li>○ Weren't full-time employees for any month of the calendar year</li> <li>○ Enrolled in self-insured coverage for one or more months of the calendar year</li> </ul> </li> </ul> <p><b>Note:</b>                      The report uses this coverage code for employees that have <b>ACA Full Time</b> set to <b>No</b> but are enrolled into qualified ACA plans.</p> <ul style="list-style-type: none"> <li>• 1H                             <p>No offer of coverage. The employee:</p> <ul style="list-style-type: none"> <li>○ Isn't offered health coverage at any point during the month</li> <li>○ Is offered coverage that's not minimum essential coverage</li> </ul> </li> <li>• 1J                             <p>Minimum essential coverage. Provides:</p> <ul style="list-style-type: none"> <li>○ Minimum value to the employee</li> <li>○ At least minimum essential coverage conditionally offered to their spouse</li> <li>○ Minimum essential coverage isn't offered to their dependents</li> </ul> </li> <li>• 1K                             <p>Minimum essential coverage. Provides:</p> <ul style="list-style-type: none"> <li>○ Minimum value offered to the employee</li> <li>○ At least minimum essential coverage offered to their dependents</li> <li>○ At least minimum essential coverage conditionally offered to their spouse</li> </ul> </li> <li>• 1L                             <p>Individual coverage HRA. Provides affordable coverage to the employee only. Determines affordability based on the employee's primary residence ZIP Code.</p> </li> <li>• 1M                             <p>Individual coverage HRA. Provides affordable coverage to the employee and dependents but not the spouse. Determines affordability based on the employee's primary residence ZIP Code.</p> </li> </ul>

Form line	Form label	Where you set it
		<ul style="list-style-type: none"> <li>• 1N                      Individual coverage HRA. Provides affordable coverage to the employee, spouse, and dependents. Determines affordability based on the employee's primary residence ZIP Code.</li> <li>• 1O                      Individual coverage HRA. Provides affordable coverage to the employee only. Determines affordability based on the employer's primary location ZIP Code.</li> <li>• 1P                      Individual coverage HRA. Provides affordable coverage to the employee and dependents but not the spouse. Determines affordability based on the employer's primary location ZIP Code.</li> <li>• 1Q                      Individual coverage HRA. Provides affordable coverage to the employee, spouse, and dependents. Determines affordability based on the employer's primary location ZIP Code.</li> <li>• 1R                      Individual coverage HRA. Doesn't provide affordable coverage.</li> <li>• 1S                      Individual coverage HRA. Offered to employees who weren't full-time for any month of the calendar year.</li> <li>• 1T                      Individual coverage HRA. Provides affordable coverage to the employee and spouse. Determines affordability based on the employee's primary residence ZIP Code.</li> <li>• 1U                      Individual coverage HRA offered to employee and spouse. Uses the employer's primary employment location ZIP Code affordability safe harbor.</li> </ul> <p>Alternately, you can use the ACA Override Upload task to override the line 14 data. For further info, see ACA Override Upload in the Help Center.</p>

Form line	Form label	Where you set it
		<p><b>Note:</b>                      You might also need to set the minimum essential coverage and Minimum value for your benefit plan. For further info, see Configure for Affordable Care Act Reporting in the Help Center.</p>
15	Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage	<p>Value is derived by the report flow</p> <p>Use the ACA Override Upload task to override any incorrect values. For further info, see ACA Override Upload in the Help Center.</p>
16	Applicable Section 4980H Safe Harbor	<p>The report process uses this hierarchy to determine the appropriate Safe Harbor value.</p> <ul style="list-style-type: none"> <li>• 2A                      Not employed for any days in the reporting month.</li> <li>• 2B                      One of the following.                     <ul style="list-style-type: none"> <li>○ The employee isn't an ACA full-time employee for the month and didn't enroll in minimum essential coverage (if offered).</li> <li>○ The employee:                             <ul style="list-style-type: none"> <li>i. Is an ACA full-time employee for the month.</li> <li>ii. Their offer of coverage (or coverage if the employee was enrolled) ended before the last day of the month. It ended solely because the employee terminated employment during the month.</li> </ul> </li> </ul> </li> <li>• 2C                      Employee with an active assignment is enrolled in the offered coverage.                       Use the ACA Override Upload task to override value 2C for employees. For further info, see ACA Override Upload in the Help Center.</li> <li>• 2D                      Employee's <b>ACA Full Time</b> is set to <b>No</b>, and their <b>Limited Nonassessment Period</b> is set to <b>Yes</b>.                       To use codes 2E, 2F, 2G, or 2H, use <b>Safe Harbor Override</b> on the Employment task to override this value at the employee level.</li> </ul>

Form line	Form label	Where you set it
		Alternately, use the ACA Override Upload task to override any incorrect values. For further info, see ACA Override Upload in the Help Center.

### PART III

This section provides info about your self-funded health coverage (if any), including the covered individuals' names, SSNs, and dates-of-birth. The report flow automatically completes this section if you have employees or other individuals enrolled in employer-sponsored self-insured health coverage.

Form line	Form label	Where you set it
(a)	Name of covered individual	<ol style="list-style-type: none"> <li>Person task</li> <li><b>Contacts</b> <ul style="list-style-type: none"> <li>Last Name</li> <li>First Name</li> </ul> </li> </ol>
(b)	SSN	<ol style="list-style-type: none"> <li>Person task</li> <li><b>Contacts</b></li> <li><b>TIN Number</b></li> </ol>
(c)	DOB	<ol style="list-style-type: none"> <li>Person task</li> <li><b>Contacts</b></li> <li><b>Date of Birth</b></li> </ol>
(d)	Covered all 12 months	Value is derived by the report flow
(e)	Months of Coverage	<p>Value is derived by the report flow if you don't select <b>Covered all 12 months</b></p> <p>Use the ACA Override Upload task to update coverage info for the employees and dependents. For further info, see ACA Override Upload in the Help Center.</p>

## How the 1094-C Transmission Manifest Gets Its Info

The info 1094-C Transmission Manifest uses comes from multiple sources.

File value	What it does	Where it comes from
<code>UniqueTransmissionId</code>	Unique identifier assigned by the transmitter to each transmission.	Manual entry.  For further info, see <a href="#">Configure the 1094-C Transmission Manifest</a> .

File value	What it does	Where it comes from
<b>Timestamp</b>	Date and time the data file was created, based on the local time zone of the transmitter.	File transmission date.
<b>PaymentYr</b>	Tax year of this information return.	Set by the US 1094-C Employer Report flow.
<b>EIN</b>	Employer identification number (EIN) belonging to the transmitter.  For aggregated group employers, this is the federal tax registration number of the aggregated Applicable Large Employer (ALE) group's tax reporting unit (TRU).  For single legal employers, it's the TRU federal tax registration number.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>EIN or TIN</b></li> </ol>
<b>TestFileCd</b>	Identifies the file type as either test or production.	<ul style="list-style-type: none"> <li>• P: Production This is the default.</li> <li>• T: Test  Manually set to this value when you are testing.</li> </ul>
<b>BusinessNameLine1Txt</b>	Filer's company name.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Name</b></li> </ol>
<b>CompanyNm</b>	Filer's company name.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Name</b></li> </ol>
<b>AddressLine1Txt</b>	Filer's complete address where all correspondence is to be sent.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
<b>AddressLine2Txt</b>	Filer's complete address where all correspondence is to be sent.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
<b>CityNm</b>	Filer's complete address where all correspondence is to be sent.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
<b>USStateCd</b>	Filer's complete address where all correspondence is to be sent.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
<b>USZIPCd</b>	Filer's complete address where all correspondence is to be sent.	<ol style="list-style-type: none"> <li>1. Legal Reporting Unit Registrations task</li> <li>2. United States Federal Tax jurisdiction</li> <li>3. <b>Registered Address</b></li> </ol>
<b>PersonFirstNm</b>	Filer's contact person info.	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> </ol>

File value	What it does	Where it comes from
		<ol style="list-style-type: none"> <li>2. Tax Reporting Unit</li> <li>3. Federal</li> <li>4. ACA Reporting Information</li> <li>5. ACA Contact First Name</li> </ol>
PersonMiddleNm	Filer's contact person info.	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. Tax Reporting Unit</li> <li>3. Federal</li> <li>4. ACA Reporting Information</li> <li>5. ACA Contact Middle Name</li> </ol>
PersonLastNm	Filer's contact person info.	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. Tax Reporting Unit</li> <li>3. Federal</li> <li>4. ACA Reporting Information</li> <li>5. ACA Contact Last Name</li> </ol>
ContactPhoneNum	Filer's contact person info.	<ol style="list-style-type: none"> <li>1. Manage Legal Reporting Unit HCM Information task</li> <li>2. Tax Reporting Unit</li> <li>3. Federal</li> <li>4. ACA Reporting Information</li> <li>5. ACA Contact Phone</li> </ol>
TotalPayeeRecordCnt	Total number of Forms 1095-C included in the entire transmission.	Run the US 1094-C Employer Report flow.
TotalPayerRecordCnt	Total number of Forms 1094-C included in the entire transmission.	Run the US 1094-C Employer Report flow.
SoftwareId	Identifies the reporting year.	Predefined on the file.
ChecksumAugmentationNum	The SHA-256 checksum value on the form data file attached to the transmission.	Manually set this value.  For further info, see <i>Configure the 1094-C Transmission Manifest</i> .
AttachmentByteSizeNum	Size in bytes of the form data file attached to the transmission.	Manually set this value. Check the 1094-C form data file size properties, and update the file size in bytes.  For further info, see <i>Configure the 1094-C Transmission Manifest</i> .

# How the ACA Eligibility Process Determines Employee Eligibility

The ACA Eligibility Process evaluates each employee to determine their eligibility and then updates their Affordable Care Act (ACA) assignment fields appropriately.

For further info, see [ACA Eligibility Process](#).

## Settings that affect this process

Your organization must be completely configured for the ACA Eligibility process to run accurately.

For further info, see:

- [Configure Legal Entities for Affordable Care Act Reporting](#)
- [How to Configure Legal Reporting Units for Affordable Care Act Reporting](#)

## How it determines eligibility for new hires

When you run this process:

1. It identifies all active employee primary assignments that fall within the parameters you set when you start the process.
2. For each of these employees, it captures the following.
  - ACA Eligibility
  - Limited Nonassessment
  - ACA Full Time
  - Measurement Start Date
  - Measurement End Date
  - Administrative Start Date
  - Administrative End Date
  - Stability Start Date
  - Stability End Date
3. For each employee, it checks if their hire or rehire date is within the start and end date parameters you set.
4. If the person's hire date is in the process's date range, the process uses the Initial columns of the ACA Eligibility Attributes table.

It uses the Ongoing columns of the table when:

- a. The person's hire isn't within the process's date range.
- b. One of their measurement, administrative, or stability end dates is within the date range.
- c. There are no other prohibitions as defined by the process's logic.

5. It checks each row in the ACA Eligibility Attributes table in sequence.
  - o If the employee isn't eligible based on any of the criteria in the Eligibility table, the process skips them and proceeds to the next employee.
  - o If it finds an eligibility match for that person, it uses the info in that row to determine the new values.

The process notes these as being the new values for the assignment parameters listed above.
6. It uses the following to determine what updates are needed on the employee's primary assignment, if any.
  - o Current values on the person's assignment as of the end date of the date range selected
  - o New values determined based on the ACA Eligibility Attributes table
  - o Additional process logic
7. If an existing employee has a status of **Yes-weekly**, **Yes-monthly**, **No-weekly**, or **No-monthly**, the process determines their new status.
  - a. Sums the hours in the predefined ACA Employee Eligible Hours balance for the current measurement period's duration.
  - b. Divides this sum by either the number of weeks or months in the measurement period, depending on the person's eligibility.
  - c. It does the following.

If the person's eligibility is	Then the process
<b>Yes-weekly</b>	i. Determines the number of weeks in the measurement period. ii. If the resulting average hours per week are greater than or equal to 30, it leaves their eligibility as <b>Yes-weekly</b> .  Otherwise, it changes the eligibility to <b>No-weekly</b> .
<b>No-weekly</b>	i. Determines the number of weeks in the measurement period. ii. If the resulting average hours per week are greater than or equal to 30, it sets their eligibility to <b>Yes-weekly</b> .  Otherwise, it leaves the eligibility as <b>No-weekly</b> .
<b>Yes-monthly</b>	i. Determines the number of months in the measurement period. ii. If the resulting average hours per month are greater than or equal to 130, it leaves their eligibility as <b>Yes-monthly</b> .  Otherwise, it changes the eligibility to <b>No-monthly</b> .
<b>No-monthly</b>	i. Determines the number of months in the measurement period. ii. If the resulting average hours per month are greater than or equal to 130, it changes their eligibility to <b>Yes-monthly</b> .  Otherwise, it leaves the eligibility as <b>No-monthly</b> .

8. If the ACA Eligibility process detects a change, it updates the primary assignment.
9. It generates audit and exception reports.

## How the ACA Eligibility Process Updates Assignment Data

The ACA Eligibility Process evaluates each employee to determine their eligibility and then updates their Affordable Care Act (ACA) assignment fields appropriately.

For further info, see [ACA Eligibility Process](#).

It uses these criteria to determine these changes.

- Legal employer ACA settings
- Employee primary assignment ACA field values
- Work hours for employees with a Yes or No eligibility

For employees whose hours fluctuate during a given measurement period, the process can consider them full time in some periods and not in others.

- Any changes you made since the last time you ran the process

You can summarize this process's actions into these scenarios.

- Determining eligibility for new employees

For further info, see [How the ACA Eligibility Process Handles New Employees](#).

- Processing employee new hires and rehires

For further info, see [How the ACA Eligibility Process Handles Crossing the Initial Stability Start Date](#).

- Transitioning employees from initial to ongoing periods

For further info, see [How the ACA Eligibility Process Migrates Employees from Initial to Ongoing Periods](#).

- Evaluating employee eligibility on an ongoing basis

For further info, see [How the ACA Eligibility Process Handles Ongoing Employees](#).

- Processing employees with multiple assignments

For further info, see [How the ACA Eligibility Process Handles Multiple Assignments](#).

## How the ACA Eligibility Process Handles New Employees

When you onboard a person, either a new employee or rehiring one who is being treated as new, the ACA Eligibility Process assigns them the initial Affordable Care Act (ACA) values based on the ACA Eligibility Attributes table.

For employees with a hire or rehire date in the process date range, the process makes these changes to their assignments.

**Note:** For the purpose of clarity, the following table abbreviates the **Yes, Weekly** and **Yes, Monthly** values to **Yes** and the **No, Weekly** and **No, Monthly** values to **No**.

To grant employees this initial ACA eligibility	When this date is within the process range	Process makes these changes
Always	Hire date	<p><b>Assignment update Effective Date:</b> Hire date.</p> <p><b>Effective Start Date:</b> Hire date</p> <p><b>ACA Eligibility:</b> No change</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>• If the administrative period dates aren't null, sets this to <b>No</b>.</li> <li>• Otherwise, sets this to <b>Yes</b>.</li> </ul> <p><b>Limited Nonassessment Period:</b></p> <ul style="list-style-type: none"> <li>• If the administrative period's start date isn't null, sets this to <b>Yes</b>.</li> <li>• Otherwise, sets this to <b>No</b>.</li> </ul> <p><b>Measurement Period Start Date:</b> Sets this to the value you set on the ACA Eligibility Attributes table.</p> <p><b>Measurement Period End Date:</b></p> <ul style="list-style-type: none"> <li>• Sets this to the measurement period's start date plus its duration.</li> <li>• If the period's start date is null, no change.</li> </ul> <p><b>Administrative Period Start Date:</b> Derives this date based on the values you set on the ACA Eligibility Attributes table.</p> <p><b>Administrative Period End Date:</b></p> <ul style="list-style-type: none"> <li>• Sets this to the administrative period's start date plus its duration.</li> <li>• If the period's start date is null, no change.</li> </ul> <p><b>Stability Period Start Date:</b></p> <ul style="list-style-type: none"> <li>• Sets this to 1 day after the initial administrative period's end date.</li> <li>• If there's no administrative period start date, sets this to the initial measurement period's start date.</li> <li>• If there's no initial measurement period start date, sets this to the person's hire date.</li> </ul> <p><b>Stability Period End Date:</b></p> <ul style="list-style-type: none"> <li>• Uses the stability period's start date plus its duration.</li> </ul>

To grant employees this initial ACA eligibility	When this date is within the process range	Process makes these changes
Yes-weekly  Yes-monthly	Hire date	<ul style="list-style-type: none"> <li>If there's no stability period start date, no change.</li> </ul> <p><b>Assignment update Effective Date:</b> Hire date.</p> <p><b>Effective Start Date:</b> Hire date</p> <p><b>ACA Eligibility:</b> No change</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>If the administrative period dates aren't null, sets this to <b>No</b>.</li> <li>Otherwise, sets this to <b>Yes</b>.</li> </ul> <p><b>Limited Nonassessment Period:</b></p> <ul style="list-style-type: none"> <li>If the administrative period's start date isn't null, sets this to <b>Yes</b>.</li> <li>Otherwise, sets this to <b>No</b>.</li> </ul> <p><b>Measurement Period Start Date:</b> Sets this to the value you set on the ACA Eligibility Attributes table.</p> <p><b>Measurement Period End Date:</b></p> <ul style="list-style-type: none"> <li>Sets this to the measurement period's start date plus its duration.</li> <li>If the period's start date is null, no change.</li> </ul> <p><b>Administrative Period Start Date:</b> Derives this date based on the values you set on the ACA Eligibility Attributes table.</p> <p><b>Administrative Period End Date:</b></p> <ul style="list-style-type: none"> <li>Sets this to the administrative period's start date plus its duration.</li> <li>If the period's start date is null, no change.</li> </ul> <p><b>Stability Period Start Date:</b></p> <ul style="list-style-type: none"> <li>Sets this to 1 day after the initial administrative period's end date.</li> <li>If there's no administrative period start date, sets this to the initial measurement period's start date.</li> <li>If there's no initial measurement period start date, sets this to the person's hire date.</li> </ul> <p><b>Stability Period End Date:</b></p> <ul style="list-style-type: none"> <li>Uses the stability period's start date plus its duration.</li> <li>If there's no stability period start date, no change.</li> </ul>
No-weekly	Hire date	<p><b>Assignment update Effective Date:</b> Hire date.</p>

To grant employees this initial ACA eligibility	When this date is within the process range	Process makes these changes
No-monthly		<p><b>Effective Start Date:</b> Hire date</p> <p><b>ACA Eligibility:</b> No change.</p> <p><b>ACA Full Time:</b> Sets this to <b>No</b>.</p> <p><b>Limited Nonassessment Period:</b> Sets this to <b>No</b>.</p> <p><b>Measurement Period Start Date:</b> Uses the value you set on the ACA Eligibility Attributes table.</p> <p><b>Measurement Period End Date:</b></p> <ul style="list-style-type: none"> <li>• Sets this to the measurement period's start date plus its duration.</li> <li>• If the measurement period's start date is null, no change.</li> </ul> <p><b>Administrative Period Start Date:</b> No change.</p> <p><b>Administrative Period End Date:</b> No change.</p> <p><b>Stability Period Start Date:</b> No change.</p> <p><b>Stability Period End Date:</b> No change.</p>
Never	Hire date	<p><b>Assignment update Effective Date:</b> Hire date.</p> <p><b>Effective Start Date:</b> Hire date</p> <p><b>ACA Eligibility:</b> No change.</p> <p><b>ACA Full Time:</b> Sets this to <b>No</b>.</p> <p><b>Limited Nonassessment Period:</b> Sets this to <b>No</b>.</p> <p><b>Measurement Period Start Date:</b> No change.</p> <p><b>Measurement Period End Date:</b> No change.</p> <p><b>Administrative Period Start Date:</b> No change.</p> <p><b>Administrative Period End Date:</b> No change.</p> <p><b>Stability Period Start Date:</b> No change.</p> <p><b>Stability Period End Date:</b> No change.</p>
Exclude	Hire date	Doesn't update any fields.

## How the ACA Eligibility Process Handles Crossing the Initial Stability Start Date

In cases where an employee's initial stability start date falls during the ACA Eligibility Process's date range, it makes these changes.

To grant employees this initial ACA eligibility	When this date is within the process range	Process makes these changes
Always Yes-weekly Yes-monthly	Stability period start date	<p><b>Assignment update date:</b> Sets this to the initial stability start date.</p> <p><b>ACA Eligibility:</b> No change.</p> <p><b>ACA Full Time:</b> Sets this to <b>Yes</b>.</p> <p><b>Limited Nonassessment Period:</b> Sets this to <b>No</b>.</p> <p><b>Measurement Period Start Date:</b> No change.</p> <p><b>Measurement Period End Date:</b> No change.</p> <p><b>Administrative Period Start Date:</b> No change.</p> <p><b>Administrative Period End Date:</b> No change.</p> <p><b>Stability Period Start Date:</b> No change.</p> <p><b>Stability Period End Date:</b> No change.</p>

## How the ACA Eligibility Process Migrates Employees from Initial to Ongoing Periods

The ACA Eligibility Process migrates new employees to Ongoing status if their initial measurement period's end date is within the process's date range.

- If the initial measurement end date is more than 1 day prior to the ongoing measurement period start month and day, the process assigns the employee ongoing dates that started in the prior year.
- If the initial measurement end date is 1 day prior the ongoing measurement period start month and day or later, the process assigns the employee the ongoing dates that started in the current calendar year.

The process makes these changes to the assignments belonging to employees who are migrating to Ongoing status.

**Note:** If you aren't using measurement dates, the employee goes from Initial to Ongoing status on their initial stability end date.

Employees with this initial ACA eligibility	Migrating to this Ongoing eligibility	When this date is within the process range	Process makes these changes
Yes-weekly Yes-monthly No-weekly No-monthly	Yes-weekly Yes-monthly	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> Sets this to <b>Yes-weekly</b> or <b>Yes-monthly</b>, as appropriate.</p> <p><b>ACA Full Time:</b> Sets this to <b>Yes</b>.</p> <p><b>Limited Nonassessment Period:</b> Sets this to <b>No</b>.</p> <p><b>Measurement Period Start Date:</b></p> <ul style="list-style-type: none"> <li>If the measurement period end date is before the ongoing measurement period's start date, sets this to the ongoing measurement period's start date, as defined in the ACA Eligibility Attributes table, and the prior calendar year.</li> <li>If the measurement period end date is on or after the ongoing measurement period's start date, sets this to the ongoing measurement period's start date, as defined in the ACA Eligibility Attributes table, and the current calendar year.</li> </ul> <p><b>Measurement Period End Date:</b> Sets this to the measurement period's start date plus its duration type and number.</p> <p><b>Administrative Period Start Date:</b></p> <ul style="list-style-type: none"> <li>If the measurement period end date is before the ongoing measurement period's start date, sets this to the ongoing administrative period's start date, as defined in the ACA Eligibility Attributes table, and the prior calendar year.</li> <li>If the measurement period end date is on or after the ongoing measurement period's start date, sets this to the ongoing administrative period's start date, as defined in the ACA Eligibility Attributes table, and the current calendar year.</li> </ul>

Employees with this initial ACA eligibility	Migrating to this Ongoing eligibility	When this date is within the process range	Process makes these changes
			<p><b>Administrative Period End Date:</b> Sets this to the administrative period's start date plus its duration.</p> <p><b>Stability Period Start Date:</b></p> <ul style="list-style-type: none"> <li>• If the measurement period end date is before the ongoing measurement period's start date, sets this to the ongoing stability period's start date, as defined in the ACA Eligibility Attributes table, and the prior calendar year.</li> <li>• If the measurement period end date is on or after the ongoing measurement period's start date, sets this to the ongoing stability period's start date, as defined in the ACA Eligibility Attributes table, and the current calendar year.</li> </ul> <p><b>Stability Period End Date:</b> Sets this to the stability period's start date plus its duration.</p>
		Stability period end date	<p><b>Assignment update Effective Date:</b> 1 day after the stability period end date.</p> <p><b>Stability Start Date:</b></p> <ul style="list-style-type: none"> <li>• If the stability period end date isn't the day prior to the ongoing stability start date, sets this to the ongoing stability period's start date, as defined in the ACA Eligibility Attributes table, with calendar year of the current ongoing stability period.</li> <li>• If the stability period end date is one day prior to the ongoing stability period's start date, sets this to the ongoing stability period's start date, as defined in the ACA Eligibility Attributes table, and the year of the next ongoing stability start date.</li> </ul> <p><b>Stability End Date:</b> Sets this to the stability period's start date plus its duration.</p>

Employees with this initial ACA eligibility	Migrating to this Ongoing eligibility	When this date is within the process range	Process makes these changes
Yes-weekly Yes-monthly No-weekly No-monthly	No-weekly No-monthly	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> Sets this to <b>No-weekly</b> or <b>No-monthly</b>, as appropriate.</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>If the person's initial eligibility was <b>No-weekly</b> or <b>No-monthly</b>, no change.</li> <li>If the person's eligibility is changing to <b>No-weekly</b> or <b>No-monthly</b>, no change.</li> </ul> <p><b>Measurement Period Start Date:</b></p> <ul style="list-style-type: none"> <li>If the measurement period end date is before the ongoing measurement period's start date, sets this to the ongoing measurement period's start date, as defined in the ACA Eligibility Attributes table, and the prior calendar year.</li> <li>If the measurement period end date is on or after the ongoing measurement period's start date, sets this to the ongoing measurement period's start date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</li> </ul> <p><b>Measurement Period End Date:</b> Sets this to the measurement period's start date plus its duration.</p> <p><b>Administrative Period Start Date:</b> Sets this to null.</p> <p><b>Administrative Period End Date:</b> Sets this to null.</p> <p><b>Stability Dates:</b> No change.</p>
		Stability period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Full Time:</b> Sets this to <b>No</b>.</p> <p><b>Stability Period Start Date:</b> If a date exists, sets this to null.</p>

Employees with this initial ACA eligibility	Migrating to this Ongoing eligibility	When this date is within the process range	Process makes these changes
			<p><b>Stability Period End Date:</b> If a date exists, sets this to null.</p>
Always	Always	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> No change.</p> <p><b>ACA Full Time:</b> No change.</p> <p><b>Measurement Period Start Date:</b></p> <ul style="list-style-type: none"> <li>If the measurement period end date is before the ongoing measurement period's start date, sets this to the ongoing measurement period's start date, as defined in the ACA Eligibility table, and the prior calendar year.</li> <li>If the measurement period end date is on or after the ongoing measurement period's start date, sets this value to the ongoing measurement period's start date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</li> </ul> <p><b>Measurement Period End Date:</b> Sets this to the measurement period's start date plus its duration.</p> <p><b>Administrative Period Start Date:</b></p> <ul style="list-style-type: none"> <li>If the measurement period end date is before the ongoing measurement period, sets this to the ongoing administrative period's start date as defined in the ACA Eligibility Attributes table, and the prior calendar year.</li> <li>If the measurement period end date is on or after the ongoing measurement period's start date, sets this to the ongoing administrative period's start date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</li> </ul> <p><b>Administrative Period End Date:</b></p> <ul style="list-style-type: none"> <li>If the administrative period's start date isn't null, sets this</li> </ul>

Employees with this initial ACA eligibility	Migrating to this Ongoing eligibility	When this date is within the process range	Process makes these changes
			to the administrative period's start date plus its duration. <ul style="list-style-type: none"> <li>If the start date is null, no change.</li> </ul> <b>Stability Period Start Date:</b> <ul style="list-style-type: none"> <li>If the measurement period end date is before the ongoing measurement period's start date, sets this to the ongoing stability period's start date, as defined in the ACA Eligibility Attributes table, and the prior calendar year.</li> <li>If the measurement period end date is on or after the ongoing measurement period's start date, sets this to the ongoing stability period's start date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</li> </ul> <b>Stability Period End Date:</b> Sets this to the stability period's start date plus its duration.
Never	Never		No changes.
Exclude	Exclude		No changes.

## How the ACA Eligibility Process Handles Ongoing Employees

Once an employee is in Ongoing status, their Affordable Care Act (ACA) processing primarily consists of checking and maintaining their eligibility

The ACA Eligibility Process considers a person in Ongoing status if their measurement period's end date:

1. Is within the process's date range
2. Is 1 day before the ongoing measurement period start date

The process makes these changes to the assignments belonging to employees who have Ongoing status.

Employees with this ACA eligibility	Migrating to this eligibility	When this date is within the process range	Process makes these changes
Any	Always	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> Sets this to <b>Always</b>.</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>• If this field is <b>Yes</b>, no change.</li> <li>• If this field is <b>No</b>, no change.</li> <li>• If this field is null, sets it to <b>No</b>.</li> </ul> <p><b>Measurement Period Start Date:</b> Sets this to the ongoing date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</p> <p><b>Measurement Period End Date:</b> Sets this to the measurement period's start date plus its duration.</p> <p><b>Administrative Period Start Date:</b></p> <ul style="list-style-type: none"> <li>• Sets this to the ongoing date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</li> <li>• If these values are null in the ACA Eligibility Attributes table, then set it to null.</li> </ul> <p><b>Administrative Period End Date:</b></p> <ul style="list-style-type: none"> <li>• Sets this to the administrative period's start date plus its duration.</li> <li>• If there's no administrative period start date in the ACA Eligibility Attributes table, then sets it to null.</li> </ul> <p><b>Stability Period Start Date:</b> No change.</p> <p><b>Stability Period End Date:</b> No change.</p>
		Administrative period end date	<p><b>Assignment update Effective Date:</b> 1 day after the administrative period end date.</p> <p><b>Stability Period Start Date:</b> Sets this to 1 day after the administrative period's end date.</p>

Employees with this ACA eligibility	Migrating to this eligibility	When this date is within the process range	Process makes these changes
			<p><b>Note:</b>                      If this isn't the ongoing stability start date, check your settings in the ACA Eligibility Attributes table.</p> <p><b>Stability Period End Date:</b> Sets this to the stability period's start date plus its duration.</p> <p><b>ACA Full Time:</b> Sets this to <b>Yes</b>.</p>
Any	Yes-weekly Yes-monthly	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> Sets this to <b>Yes-weekly</b> or <b>Yes-monthly</b>, as appropriate.</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>• If this field is <b>Yes</b>, no change.</li> <li>• If this field is <b>No</b>, no change.</li> <li>• If this field is null, sets it to <b>No</b>.</li> </ul> <p><b>Measurement Period Start Date:</b> Sets this to the ongoing measurement period start date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</p> <p><b>Measurement Period End Date:</b> Sets this to the measurement period's start date plus its duration.</p> <p><b>Administrative Period Start Date:</b></p> <ul style="list-style-type: none"> <li>• Uses the ongoing administrative period start date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</li> <li>• If these values are null in the ACA Eligibility Attributes table, then sets it to null.</li> </ul> <p><b>Administrative Period End Date:</b></p> <ul style="list-style-type: none"> <li>• If the start date is null, sets the end date to null.</li> <li>• Otherwise sets this to the administrative period's start date plus its duration.</li> </ul>

Employees with this ACA eligibility	Migrating to this eligibility	When this date is within the process range	Process makes these changes
			<p><b>Stability Period Start Date:</b> No change.</p> <p><b>Stability Period End Date:</b> No change.</p>
		Administrative period end date	<p><b>Assignment update Effective Date:</b> 1 day after the administrative period end date.</p> <p><b>Stability Period Start Date:</b> Sets this to 1 day after the current administrative period's end date.</p> <p><b>Note:</b>                      If this isn't the ongoing stability start date, check your settings in the ACA Eligibility Attributes table.</p> <p><b>Stability Period End Date:</b> Sets this to the stability period's start date plus its duration.</p> <p><b>ACA Full Time:</b> Sets this to <b>Yes</b>.</p>
Any	No-weekly No-monthly	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> Sets this to <b>No-weekly</b> or <b>No-monthly</b>, as appropriate.</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>• If this field is <b>Yes</b>, no change.</li> <li>• If this field is <b>No</b>, no change.</li> <li>• If this field is null, sets it to <b>No</b>.</li> </ul> <p><b>Measurement Period Start Date:</b>                      Uses the ongoing measurement period start date, as defined in the ACA Eligibility Attributes table, and the appropriate year.</p> <p><b>Measurement Period End Date:</b>                      Sets this to the measurement period start date plus its duration.</p> <p><b>Administrative Period Start Date:</b>                      Sets this to null.</p> <p><b>Administrative Period End Date:</b>                      Sets this to null.</p>

Employees with this ACA eligibility	Migrating to this eligibility	When this date is within the process range	Process makes these changes
			<p><b>Stability Period Start Date:</b> No change.</p> <p><b>Stability Period End Date:</b> No change.</p>
		Stability period end date	<p><b>Assignment update Effective Date:</b> 1 day after the stability period end date.</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>• If this is <b>Yes</b>, sets it to <b>No</b>.</li> <li>• If this is <b>No</b>, no change.</li> <li>• If this is null, sets it to <b>No</b>.</li> </ul> <p><b>Stability Period Start Date:</b> Sets this to null.</p> <p><b>Stability Period End Date:</b> Sets this to null.</p>
Any	Never	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> Sets this to <b>Never</b>.</p> <p><b>ACA Full Time:</b></p> <ul style="list-style-type: none"> <li>• If this is <b>Yes</b>, no change.</li> <li>• If this is <b>No</b>, no change.</li> <li>• If this is null, sets it to <b>No</b>.</li> </ul> <p><b>Measurement Period Start Date:</b> Sets this to null.</p> <p><b>Measurement Period End Date:</b> Sets this to null.</p> <p><b>Administrative Period Start Date:</b> Sets this to null.</p> <p><b>Administrative Period End Date:</b> Sets this to null.</p> <p><b>Stability Period Start Date:</b> No change.</p> <p><b>Stability Period End Date:</b> No change.</p>
		Stability period end date	<p><b>Assignment update Effective Date:</b> 1 day after the stability period end date.</p> <p><b>ACA Full Time:</b></p>

Employees with this ACA eligibility	Migrating to this eligibility	When this date is within the process range	Process makes these changes
			<ul style="list-style-type: none"> <li>• If this is <b>Yes</b>, sets it to <b>No</b>.</li> <li>• If this is <b>No</b>, no change.</li> <li>• If this is null, sets it to <b>No</b>.</li> </ul> <p><b>Stability Period Start Date:</b> Sets this to null.</p> <p><b>Stability Period End Date:</b> Sets this to null.</p>
Any	Exclude	Measurement period end date	<p><b>Assignment update Effective Date:</b> 1 day after the measurement period end date.</p> <p><b>ACA Eligibility:</b> Sets this to <b>Exclude</b>.</p> <p><b>Note:</b>                      This status indicates you're maintaining this employee's eligibility manually or through a third-party application.</p> <p><b>ACA Full Time:</b> Sets this to null.</p> <p><b>Measurement Period Start Date:</b> Sets this to null.</p> <p><b>Measurement Period End Date:</b> Sets this to null.</p> <p><b>Administrative Period Start Date:</b> Sets this to null.</p> <p><b>Administrative Period End Date:</b> Sets this to null.</p> <p><b>Stability Period Start Date:</b> Sets this to null.</p> <p><b>Stability Period End Date:</b> Sets this to null.</p>

## How the ACA Eligibility Process Handles Multiple Assignments

When an employee has multiple assignments, the ACA Eligibility Process uses their primary assignment to defines their Affordable Care Act (ACA) status, which includes the appropriate fields on the assignment.

# 5 Reports and Processes

## ACA Eligibility Process

The ACA Eligibility process evaluates each employee to determine their eligibility and then updates their Affordable Care Act (ACA) assignment fields appropriately.

For further info, see [How the ACA Eligibility Process Updates Assignment Data](#).

Run this process at least weekly, with a consecutive 1-week date range to cover all consecutive dates in the year. This ensures the primary assignment is correct as of the last day of the month. When running for the last day of the month, be sure your end date is the last day of the month.

To run this process:

1. From **My Client Groups**, click **Payroll**.
2. Click **Submit a Flow**.
3. Select your US legislative data group (LDG).
4. Search for and select **ACA Eligibility Process**.

## Before you begin

You must ensure your organization is fully configured for ACA reporting.

For further info, see:

- [Configure Legal Entities for Affordable Care Act Reporting](#)
- [How to Configure Legal Reporting Units for Affordable Care Act Reporting](#)

## Process parameters

### Legal Employer

If you select a legal employer, the process runs for all employees assigned to it.

If you leave it blank, it runs for all employees in all legal employers.

### Start and End Date

When you run the process, it includes these dates in its calculations.

Use the standard month, day, and year format, such as 12/15/26. The end date must be after the start date.

If you have employees with back-dated assignment updates, run this process using the back dates as the date range.

### Reporting Mode

Select **Draft** to generate the audit and exception report only.

Select **Final** to update the employees' assignments, if not already updated by a prior run, and generate the audit and exception reports.

### Payroll Relationship Group

Use this field to check ACA eligibility for persons belonging to a specific payroll relationship group. You can specify a value only if you have a predefined payroll relationship group.

### Process Configuration Group

Select a process configuration group if you've defined one.

## Process results

When you run this process, either in Draft or Final mode, it generates these audit and exception reports. Both files are in CSV format, viewable in a spreadsheet program, such as Microsoft Excel.

Use these files to help you evaluate the changes the process makes to your employee info.

Report name	How you use it
Audit	<p>Lists the employees that had date-effective assignment updates performed by the process. It shows the current values and the proposed values.</p> <p>To help illustrate the changes, the detail record includes the related assignment data with the previous info in the first row and the new info in the following row. The new assignment date is the start date of the assignment update. The previous assignment date is the new assignment date less 1 day.</p> <ul style="list-style-type: none"> <li>• Current values in the first row</li> <li>• Proposed changes in the second row</li> </ul> <p>The first row represents the old record, and the second row represents the new record.</p> <p>This report uses this sort order.</p> <ol style="list-style-type: none"> <li>1. Legal employer</li> <li>2. Person name</li> <li>3. Current values</li> <li>4. Proposed changes</li> </ol> <p>You can't override this sort order.</p>
Exception	<p>This report lists the exceptions detected by the process.</p> <p>Resolve these issues before you run the process in Final mode.</p>

For info on the logic the process uses to make these changes, see [How the ACA Eligibility Process Updates Assignment Data](#).

## ACA Override Upload

Use the ACA Override Upload task to populate the ben\_aca\_reporting table with any Affordable Care Act (ACA) overrides you want to apply to your employees.

When you run the Archive End-of-Year ACA Information process:

1. It checks the ben\_aca\_reporting table for overrides.
2. If it finds an override, it applies the override instead of the derived value.

Use the ACA Override Upload task to populate this table with your overrides.

## Before you begin

Run the Archive End-of-Year process and you have identified data you want to correct.

## Define the overrides

To define employee overrides for ACA:

1. Start the ACA Override Upload task.
  - a. From **Benefits Administration**, click **Evaluation and Reporting**.
  - b. Click **Person Data Loaders**.
  - c. Click **Go to Task** for the ACA Override Upload task.  
This opens a Microsoft Excel spreadsheet where you can enter the overrides.
2. Update the fields in the spreadsheet you want overridden with their override values.
3. Click **Upload** when finished.

## Archive End-of-Year ACA Info

This flow identifies all employees with active assignments and their Affordable Care Act (ACA) info and then captures it in preparation for your ACA reporting.

Run this archive prior running the ACA report processes.

To run this flow:

1. From **My Client Groups**, click **Payroll**.
2. Click **Submit a Flow**.
3. Select your US legislative data group (LDG).
4. Search for and select **Archive End-of-Year ACA Information**.

Alternately, you can run it from **Submit Extracts** in **Data Exchange**.

## Before you start

Make sure you have fully configured your organization for ACA reporting.

For further info, see:

- [Configure Legal Entities for Affordable Care Act Reporting](#)
- [How to Configure Legal Reporting Units for Affordable Care Act Reporting](#)

Make sure your employee ACA info is up to date. For further info, see [Overview of Affordable Care Act Reporting](#).

## Flow parameters

### Year

Enter the reporting year as a 4-digit number, such as **2022**.

## Legal Employer

Search for and select the legal employer you want to archive. The flow captures the ACA info for all employees attached to it based on the aggregate ALE group you set on the TRU.

## ACA File Type

Select either **Original** or **Replacement**.

## Submission IDs for Replacement

If you're generating a 1094-c replacement file using Submission mode, specify the submission IDs you're replacing.

Enter numbers separated by commas with no spaces.

## Original Payroll Flow

If you're generating a replacement file using Submission mode, search for and select the original payroll flow.

## Flow results

The archive generates an audit report of all employees with an active assignment during the selected calendar year. It includes all employee-level info required for 1094-C and 1095-C reporting.

# US 1094-C Employer Report

The US 1094-C Employer Report flow uses the latest Affordable Care Act (ACA) archive info to generate the 1094-C electronic data file for all eligible employees in XML format.

To run this flow:

1. From **My Client Groups**, click **Payroll**.
2. Click **Submit a Flow**.
3. Select your US legislative data group (LDG).
4. Search for and select **US 1094-C Employer Report**.

## Before you start

Run the archive flow to ensure you capture the latest updates of the ACA data. There's no need to run the archive flow again if:

1. You ran it before and issued 1095-C forms to employees.
2. There are no changes to employee or employer data.

Configure the transmission manifest for this reporting cycle. For further info, see [Configure the 1094-C Transmission Manifest](#).

## Report parameters

### Year

Enter the reporting year as a 4-digit number, such as **2022**.

### Legal Employer

Search for and select the legal employer you want to report. The flow uses the ACA info for all employees attached to it.

### State

Select **CA** to generate a file in XML format for California.

Select **DC** to generate a file in .txt format for Washington DC.

Select **NJ** to generate a file XML format for New Jersey.

Select **RI** to generate a file XML format for Rhode Island.

The report flow includes any employees who lived in these locations for at least 1 day during the reporting year.

### ACA File Type

Identify the transmittal file as either an original or replacement file.

### Receipt ID

If you're generating a replacement file and using the Transmission mode, specify the receipt ID you received after submitting the original data file to IRS.

### Replacement Mode

If you're generating a replacement file:

- Select **Submission** to generate a replacement file for a submission rejected by the IRS.
- Select **Transmission** to generate a replacement file for a rejected transmission by the IRS. This is required only for original records that were rejected.

Leave blank if this is an original file.

### Process Configuration Group

To post Form 1094-C to Document Records, configure a different process configuration group that has the **XML Data Source** parameter set to **N**. Select this process configuration group here when running the 1094-C employer report.

## Report output

To view the output of this flow:

1. Open the **Navigator**, and select **Reports and Analytics** in **Tools**.
2. Click **>>**, and select **Shared Folders**.
3. Expand **Human Capital Management, Benefits, US**, and then **ACA**.
4. For **1094cElectronicFile**.
5. In **Actions**, click **Report History**.
6. In **Filters**, clear the values in **Owner** and **Start Processing**.
7. Click **Search**.
8. Select the name of the report job you want to view.
9. Select **Output Name** in **Output & Delivery**.

## US 1095-C Employee Report

The US 1095-C Employee Report flow uses the latest Affordable Care Act (ACA) archive info to generate the Form 1095-C employee report for all eligible employees. Use this flow to generate the original or replacement 1095-C form.

To run this flow:

1. From **My Client Groups**, click **Payroll**.
2. Click **Submit a Flow**.
3. Select your US legislative data group (LDG).
4. Search for and select **US 1095-C Employee Report**.

### Before you start

Run the archive flow to ensure you capture the latest updates of the ACA data. There's no need to run the archive flow again if:

1. You ran it before and issued 1095-C forms to employees.
2. There are no changes to employee or employer data.

To roll back the documents posted to Document Records:

1. Roll back the ACA archive.
2. Rerun the archive and 1095-C flow.

### Report parameters

#### Year

Enter the reporting year as a 4-digit number, such as **2022**.

#### Legal Employer

Search for and select the legal employer you want to report. The flow uses the ACA info for all employees attached to it.

#### Reporting Mode

Choose one of the following.

- Select **Draft** to create a draft of this report for data verification purposes.
- Select **Final** to generate the final version of the report. The report flow automatically publishes a copy of the 1095-C to the Document Records.

#### Process Configuration Group

To post Form 1095-C to Document Records, configure a different process configuration group that has the **XML Data Source** parameter set to **N**. Select this process configuration group here when running the 1095-C employee report.

### Report output

This flow generates a 1095-C report for all eligible employees as a PDF file. It stores a copy in Document Records for employee access through their **Me** page.

**Note:** This flow doesn't recognize 1095-C document preferences set by the employee.

## Rerun the report

If you are rerunning this report for a previous reporting period, you must roll back the documents already posted to Document Records.

1. Roll back the 1095-C process.
2. Roll back the ACA archive.
3. Rerun the archive and 1095-C process.

