



SYSSERO

Managing Annual 1094-c/ 1095-c Configuration

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Updating ACA Measurement Periods

Confirm you have up to date measurement periods and at least one built for the next future period. This just makes sure your measurement periods are up to date and if by chance next year you do not update in a timely manner, this will give you a buffer to avoid any gap issues.

When building new measurement periods, each requires its own ACA Eligibility Rule but they only need to be unique in name. So you can create a new one with a name that includes the months and year you are measuring and you can copy the rows from a previous ACA MP rule to make it go by faster. Below is an example for creating new Eligibility Rules.

Measurement Eligibility Rules to create

- a. USA ACA Measurement Period 10/2024 to 10/2025 Benefits Eligibility
- b. USA ACA Measurement Period 10/2025 to 10/2026 Benefits Eligibility

Basically just need to use a previous eligibility rule to copy into this new one and use the same naming convention but update for the new years.

Create Benefit Eligibility Rule ✕

Benefit Eligibility Rule Type *

- ACA 1095-C Tuning Eligibility Rule
- ACA 4980H Safe Harbor Eligibility Rule
- ACA Measurement Period Eligibility Rule
- Benefit Group Eligibility Rule
- Benefit Plan Eligibility Rule
- Dependent Benefit Eligibility Rule

Cancel OK

View ACA Measurement Period Eligibility Rule USA ACA Measurement Period 10/2024 to 10/2025 Benefits Eligibility ⋮

Condition Rule USA ACA Measurement Period 10/2024 to 10/2025 Benefits Eligibility

Description USA ACA Measurement Period 10/2024 to 10/2025 Benefits Eligibility

Comment (empty)

Category (empty)

Derived Logic Worker is Employee is not blank And Location Address - Country in the selection list United States of America And Active Status (Benefits) equal to Y And (Total Scheduled Weekly Hours for Multi-Job (Fixed Term), Seasonal (Fixed Term) (Seasonal) (inactive), Temporary (inactive))

Rule Conditions Rule Usage

Rule Conditions 5 items

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value)
And		<input checked="" type="checkbox"/> Worker is Employee	is not blank	Value specified in this filter		
And		<input checked="" type="checkbox"/> Location Address - Country	in the selection list	Value specified in this filter	United States of America	
And		<input checked="" type="checkbox"/> Active Status (Benefits)	equal to	Value specified in this filter	Yes	
And	(<input checked="" type="checkbox"/> Total Scheduled Weekly Hours for Multi-Job (Benefits)	less than	Value specified in this filter		30
Or		<input checked="" type="checkbox"/> Employee Type	any in the selection list	Value specified in this filter	Intern (Fixed Term) Seasonal (Fixed Term) (Seasonal) (inactive) Temporary (inactive))



View ACA Measurement Period Eligibility Rule USA ACA Measurement Period 10/2025 to 10/2026 Benefits Eligibility

Condition Rule USA ACA Measurement Period 10/2025 to 10/2026 Benefits Eligibility

Description USA ACA Measurement Period 10/2025 to 10/2026 Benefits Eligibility

Comment (empty)

Category (empty)

Derived Logic Worker is Employee is not blank And Location Address - Country in the selection list United States of America And Active Status (Benefits) equal to Y And (Total Scheduled Weekly Hours for Mult (Fixed Term), Seasonal (Fixed Term) (Seasonal) (inactive), Temporary (inactive))

Rule Conditions Rule Usage

Rule Conditions 5 items

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value)
And		<input checked="" type="checkbox"/> Worker is Employee	is not blank	Value specified in this filter		
And		<input checked="" type="checkbox"/> Location Address - Country	in the selection list	Value specified in this filter	United States of America	
And		<input checked="" type="checkbox"/> Active Status (Benefits)	equal to	Value specified in this filter	Yes	
And	(<input checked="" type="checkbox"/> Total Scheduled Weekly Hours for Multi-Job (Benefits)	less than	Value specified in this filter		30
Or		<input checked="" type="checkbox"/> Employee Type	any in the selection list	Value specified in this filter	Intern (Fixed Term) Seasonal (Fixed Term) (Seasonal) (inactive) Temporary (inactive))

Ensure you have measurement periods that cover historically all the periods you want to see within Workday. For each year you are missing you will need a new Measurement Period and ACA Eligibility Rule to tie into each MP.

Note: Measurement Periods are typically built to align with your Open Enrollment period. So, you want to make sure your measurement period ends prior to when you launch Open Enrollment. This ensures the period is over and everyone that needs to be measured and qualifies, receives OE properly. The Administrative Period Duration cannot exceed 90 days so make sure your dates align enough to where you can have your Stability Start Date be the same day your Benefit Plan Year begins. Typically this would be January 1st.

Below are the steps for building Measurement Periods from 2021-2026:

- 1) Measurement Periods to Create
 - a. ACA 2021 - 2022 Measurement Period
 - b. ACA 2022 - 2023 Measurement Period
 - c. ACA 2023 - 2024 Measurement Period
 - d. ACA 2024 - 2025 Measurement Period
 - e. ACA 2025 - 2026 Measurement Period

Can use the same setup as the first one created. Just need to add the Eligibility rule associated with that year, the Measurement Period Start Date and make sure the Admin Period Duration makes the Stability Start Date = to 1/1.

- The checkbox for Include In Passive Event Processing should only be checked if you need those in the Ongoing period to receive an event outside of Open Enrollment. This is typically only for clients running Measurement Periods that don't align with Open Enrollment. If you align with OE then this should be unchecked.



Create ACA Measurement Period

Measurement Period Name * ACA 2021 - 2022 Measurement Period

Measurement Period Eligibility Rule * USA ACA Measurement Period 10/20...▼

Use 2015 Transition Measurement Period Rules

Ongoing Measurement Period

Measurement Period Start Date * 10/15/2021

Measurement Period Duration (Months) * 12

Measurement Period End Date 10/14/2022

Administrative Period Start Date 10/15/2022

Administrative Period Duration (Days) 78

Administrative Period End Date 12/31/2022

Stability Period Start Date 01/01/2023

Stability Period Duration (Months) 12

Stability Period End Date 12/31/2023

Include in Passive Event Processing

New Hire Measurement Period

Admin Period Duration Before Measurement Period (Days)	<input type="text" value="0"/>
Measurement Period Duration (Months)	12
Admin Period Duration After Measurement Period (Days)	<input type="text" value="0"/>
Stability Period Duration (Months)	12

Create ACA Measurement Period

Measurement Period Name * ACA 2022 - 2023 Measurement Period

Measurement Period Eligibility Rule * USA ACA Measurement Period 10/20...▼

Use 2015 Transition Measurement Period Rules

Ongoing Measurement Period

Measurement Period Start Date * 10/15/2022

Measurement Period Duration (Months) * 12

Measurement Period End Date 10/14/2023

Administrative Period Start Date 10/15/2023

Administrative Period Duration (Days) 78

Administrative Period End Date 12/31/2023

Stability Period Start Date 01/01/2024

Stability Period Duration (Months) 12

Stability Period End Date 12/31/2024

Include in Passive Event Processing

New Hire Measurement Period

Admin Period Duration Before Measurement Period (Days)	<input type="text" value="0"/>
Measurement Period Duration (Months)	12
Admin Period Duration After Measurement Period (Days)	<input type="text" value="0"/>
Stability Period Duration (Months)	12



Create ACA Measurement Period

Measurement Period Name * ACA 2023 - 2024 Measurement Period

Measurement Period Eligibility Rule * USA ACA Measurement Period 10/20... ▾

Use 2015 Transition Measurement Period Rules

Ongoing Measurement Period

Measurement Period Start Date * 10/15/2023

Measurement Period Duration (Months) * 12

Measurement Period End Date 10/14/2024

Administrative Period Start Date 10/15/2024

Administrative Period Duration (Days) 78

Administrative Period End Date 12/31/2024

Stability Period Start Date 01/01/2025

Stability Period Duration (Months) 12

Stability Period End Date 12/31/2025

Include in Passive Event Processing

New Hire Measurement Period

Admin Period Duration Before Measurement Period (Days) 0

Measurement Period Duration (Months) 12

Admin Period Duration After Measurement Period (Days) 0

Stability Period Duration (Months) 12

Create ACA Measurement Period

Measurement Period Name * ACA 2024 - 2025 Measurement Period

Measurement Period Eligibility Rule * USA ACA Measurement Period 10/20... ▾

Use 2015 Transition Measurement Period Rules

Ongoing Measurement Period

Measurement Period Start Date * 10/15/2024

Measurement Period Duration (Months) * 12

Measurement Period End Date 10/14/2025

Administrative Period Start Date 10/15/2025

Administrative Period Duration (Days) 78

Administrative Period End Date 12/31/2025

Stability Period Start Date 01/01/2026

Stability Period Duration (Months) 12

Stability Period End Date 12/31/2026

Include in Passive Event Processing

New Hire Measurement Period

Admin Period Duration Before Measurement Period (Days) 0

Measurement Period Duration (Months) 12

Admin Period Duration After Measurement Period (Days) 0

Stability Period Duration (Months) 12



Create ACA Measurement Period

Measurement Period Name * ACA 2025 - 2026 Measurement Period

Measurement Period Eligibility Rule * USA ACA Measurement Period 10/20... ▾

Use 2015 Transition Measurement Period Rules

Ongoing Measurement Period

Measurement Period Start Date * 10/15/2026 📅

Measurement Period Duration (Months) * 12

Measurement Period End Date 10/14/2027

Administrative Period Start Date 10/15/2027

Administrative Period Duration (Days) 78

Administrative Period End Date 12/31/2027

Stability Period Start Date 01/01/2028

Stability Period Duration (Months) 12

Stability Period End Date 12/31/2028

Include in Passive Event Processing

New Hire Measurement Period

Admin Period Duration Before Measurement Period (Days) 0

Measurement Period Duration (Months) 12

Admin Period Duration After Measurement Period (Days) 0

Stability Period Duration (Months) 12

Run the ACA Passive Event (do not have Generate Events checked off). This is just to generate measurement period data for all workers. This is typically picked up during the daily event, but since we are building this after it's ran, its best to just run this now while we are building the other pieces. Running now lets you do any validation and audit to make sure hours are calculated correctly.

Schedule Passive Events

Run Frequency Run Now ▾

Cancel OK

Request Name * ACA Measurement History Update

Run Frequency Run Now

Passive Event Rules

Passive Event Rules * × PE: USA ACA Eligibility 🗑️ ⋮

Generate Passive Events

Generate Passive Alerts

Ensure your Affordable Care Reporting Configuration task is built correctly. At least the Federal Poverty Level pieces at the bottom of the page need to be updated each year. The government typically releases out those pieces around December and January time frame. Other pieces that might need adjustments would be the Payroll Hours Source. Please check with your Legal team the right hours are being pulled in.

Screenshots below illustrate that the Payroll Hours Source and Federal Poverty Level sections were missing key data

Update the task [Affordable Care Reporting Configuration](#).

- 1) Need to update the Federal Poverty Levels. Only 2019-2021 were in there. Need to bring it up to 2024.
- 2) Also, need to update the Payroll Hours Source. It did not appear that the right codes were listed in there. It should include all earning codes for Paid Hours Worked and Not Worked. These should also be codes that are listed as Unprorated.



Workday Payroll Hours Source: Payroll Calculations

Instructions: Enter only hourly pay component-related calculations. Ignore warnings if the custom pay component-related calculations are hourly.

Payroll Calculation for Paid Hours Worked

- × 02 Overtime ...
 - × 02 Overtime - FLSA Payment for Straight Time of Overtime ...
 - × 02 Overtime - FLSA Rate ...
 - × 02 Overtime - Hours (unprorated) ...
 - × Overtime Hours 1 ...
- MORE (3)**

Alert:
Select hours-based pay component-related calculations. Example: The related calculation may say Salary or Rate.

Payroll Calculation for Paid Hours Not Worked (PTO)

- × Floating Holiday Payout ...
 - × Floating Holiday Payout - Hours (unprorated) ...
 - × Floating Holiday Payout - Rate ...
 - × Holiday ...
 - × Holiday - Hours (unprorated) ...
 - × Holiday - Rate ...
- LESS (1)**

Federal Poverty Levels

Continental United States 6 items

	*Federal Poverty Level Year	*Federal Poverty Level Amount
+	2024	15,060.00
-	2023	14,580.00
-	2022	13,590.00
-	2021	12,760.00
-	2020	12,490.00
-	2019	12,140.00

Affordable Care Coverage Standard 6 items

	*Coverage Year	*Percent of Annual Income
+	2024	8.39
-	2023	9.12
-	2022	9.61
-	2021	9.83
-	2020	9.78
-	2019	9.86

Tuning rules may be needed when you are building your 1094-C Company Configuration. These rules will either include or exclude workers from having 1095-c forms built (this only applies to when you run the task- Create ACA 1095-C/1094-C Data and forms can be created by using the EIB for loading the forms). Best to only use one rule, so either building a rule to Include all who need forms or one to Exclude those who don't need one. Whichever is easier to build.

The example below is building a rule for Excluding a set of workers:



Create Benefit Eligibility Rule [ACA 1095-C Tuning Eligibility Rule](#) - this is creating the rule to exclude the contingents and interns for each company.

Create Benefit Eligibility Rule

Benefit Eligibility Rule Type *

- ACA 1095-C Tuning Eligibility Rule
- ACA 4980H Safe Harbor Eligibility Rule
- ACA Measurement Period Eligibility Rule
- Benefit Group Eligibility Rule
- Benefit Plan Eligibility Rule
- Dependent Benefit Eligibility Rule

View ACA 1095-C Tuning Eligibility Rule

1094-C Exclusion Rule (Contingents and Interns) ⋮

Condition Rule [1094-C Exclusion Rule \(Contingents and Interns\)](#)

Description 1094-C Exclusion Rule (Contingents and Interns)

Comment (empty)

Category (empty)

Derived Logic Worker is Employee equal to No Or Employee Type any in the selection list Intern (Fixed Term)

[Rule Conditions](#) Rule Usage

Rule Conditions 2 items

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And		<input type="checkbox"/> Worker is Employee	equal to	Value specified in this filter	No
Or		<input type="checkbox"/> Employee Type	any in the selection list	Value specified in this filter	Intern (Fixed Term)

Safe Harbor must be configured each year. This consists of an Eligibility Rule and general Calendar year setup. The eligibility rule typically is pretty simple in building and mostly consists of workers being Active and what Companies they apply to. Although the Calendar Year setup needs to be built for each year the eligibility rule itself can be used continuously as long as the eligibility doesn't change.

The screenshot below has the Company values removed for Client Confidentiality.

Create Benefit Eligibility Rule- [ACA 4980H Safe Harbor Eligibility Rule](#)- these rules are pretty generic in their build. Just using the Active Status benefits field and Company Benefits Field.

- ACA W2 4980H Safe Harbor Eligibility Rule



View ACA 4980H Safe Harbor Eligibility Rule ACA W2 4980H Safe Harbor Eligibility Rule

Condition Rule [ACA W2 4980H Safe Harbor Eligibility Rule](#)

Description ACA W2 4980H Safe Harbor Eligibility Rule

Comment (empty)

Category (empty)

Derived Logic Active Status (Benefits) equal to Y And Company (Benefits) in the selection list 1KD THR Property Management LP, 3PM Invitation Homes SFR PM LLC, DF1 Invitation

[Rule Conditions](#) [Rule Usage](#)

Rule Conditions 2 items

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And		<input checked="" type="checkbox"/> Active Status (Benefits)	equal to	Value specified in this filter	Yes
And		<input checked="" type="checkbox"/> Company (Benefits)	in the selection list	Value specified in this filter	

This is the second piece for building the Safe Harbor configuration. This is where you can apply the eligibility rule and define what rules your Safe Harbor looks at. Only 1 type can apply to a set of workers for the same company. If by chance you have a company that needs to use multiple types, like W2 and Federal Poverty, you will need to build separate eligibility rules to apply those types. Workers should only be looked at one type of Safe Harbor setup (unless that setup is different during different months of the year, this is very rare that happens)

[Create ACA 4980H Safe Harbor Configuration](#) - this setup is pretty basic too. You need to build this Every Year. A company can only be tied to one rule per year. But not every company has to use the same rule. You can have a rule based on Federal Poverty, Multi Employer, Rate of Pay or W2. Most companies follow the W2 rule.

- All companies can either be on one line and one Eligibility Rule. But if they are different you need to add a new row to associate the separation and the companies must not overlap in the rule.

Create ACA 4980H Safe Harbor Configuration

Year

ACA 4980H Safe Harbor Configuration 2024 - ACA Safe Harbor Configuration

Calendar Year 2024

1 item

ACA 4980H Safe Harbor	Month(s)	ACA 4980H Safe Harbor Eligibility Rule
W2 Safe Harbor	January February March April May June July August September October November December Less (7)	ACA W2 4980H Safe Harbor Eligibility Rule



If your company qualifies as ALE you will need to build an ALE group for each month that applies each calendar year.

The screenshot below has the Company values removed for Client Confidentiality, but these include each company that needs 1094-c configuration.

Create ACA ALE Group- this is also very simple and this needs to be done Every Year. This is just associating the companies to all months in the calendar year. If you ever have a company created mid year (and also switched employees mid year), then you would create a separate line for when that company was active to be counted. Otherwise, all companies are just under all months.

For each company with US Workers you will need to build the 1094-C Company Configuration. This section below does have some blank fields as Client Information does auto populate and that has been removed for Confidentiality.

Create ACA 1094-C Company Configuration- will need to do this annually for each company to report out on.

- Company 1- only showing 1 since setup between companies typically isn't all that different. The biggest difference is that when you create the ACA FTE totals, and they appear on this configuration, you may need to adjust accordingly.

For each company need to complete the following:

- 1) Top main section
 - a. Add the exclusion rule
- 2) Enable External ACA Transmission- for you nothing here. But this section is used if you have an external provider that will access your tenant to extract information for transmitting data. Otherwise it can be done manually or through the ACA Connector
- 3) 1095-C Code Configuration- If your medical coverage stops at the end of the month, check the box and then choose 01 for the Plan Start Month since your plan year definition starts 1/1.
- 4) Part I Applicable Large Employer Member (ALE Member)- this is general contact information for the company and representative. Just need to add the Rep contact info.
- 5) Designated Government Entity (DGE) (Only if Applicable)- not applicable and can ignore
- 6) Part II ALE Member Information- this is where you check off whether you use the 98% Offer Method or Qualifying Offer Method or both
- 7) Part III ALE Member Information- Monthly- If you offer the minimum essential coverage for all 12 months, check this first box and then in the table check the box under the second column



- a. Since you have workers you need to exclude the FTE counts will be incorrect. You will need to utilize a custom report to pull in those numbers and update this table manually each year. That will be explained in another section below
- b. If there are any changes to this configuration you will need to Delete all ACA 1094-c/1095-c Data and forms (as long as they haven't been transmitted) and then re-create them all.
 - i. If they have been transmitted you will need to run the task Create ACA 1095-C/1094-C Data (Corrections) and transmit those corrections.

Company 1

Create ACA 1094-C Company Configuration 101

Calendar Year: 2023

Company: [Dropdown]

Include Retirees:

Include ACA 1095-C Tuning Eligibility Rule Workers: [Dropdown]

Exclude ACA 1095-C Tuning Eligibility Rule Workers: 1094-C Exclusion Rule
x (Contingents and nonRegular) ...

Enable External ACA Transmission

External Federal ACA Transmission:

External State ACA Transmission:

1095-C Code Configuration

Use coverage end date in month of termination:

Plan Start Month: * x 01 [Dropdown]

Create ACA 1094-C Company Configuration

Year: * 2024 [Dropdown]

Company: * [Redacted] [Dropdown]

Part I Applicable Large Employer Member (ALE Member)

Name of ALE Member (Employer) (Line 1) * [Text Box]

Street address (including room or suite no.) (Line 3) * [Text Box]

City or town (Line 4) * [Text Box]

State or province (Line 5) * [Text Box]

Employer ISO country code (2 letter) (Line 6) * [Text Box]

Employer ZIP or foreign postal code (Line 6) * [Text Box]

First name of person to contact (Line 7) * [Text Box]

Middle name of person to contact (Line 7) [Text Box]

Last name of person to contact (Line 7) * [Text Box]

Suffix of person to contact (Line 7) [Text Box]

Contact telephone number (Line 8) * [Text Box]

Designated Government Entity (DGE) (Only if applicable)

Name of Designated Government Entity (Line 9) [Text Box]

Employer identification number (EIN) (Line 10) [Text Box]

Street address (including room or suite no.) (Line 11) [Text Box]

City or town (Line 12) [Text Box]

US state code (2 letter) or foreign province name (Line 13) [Text Box]

ISO country code (2 letter) (Line 14) [Text Box]

ZIP or foreign postal code (Line 14) [Text Box]

First name of person to contact (Line 15) [Text Box]

Middle name of person to contact (Line 15) [Text Box]

Last name of person to contact (Line 15) [Text Box]

Suffix of person to contact (Line 15) [Text Box]

Contact telephone number (Line 16) [Text Box]

Part II ALE Member Information

Certifications of Eligibility (select all that apply) (Line 22) [Dropdown]

Part III ALE Member Information—Monthly

Same Minimum Essential Coverage settings for all 12 months?

Part II ALE Member Information

Certifications of Eligibility (select all that apply) (Line 22) [Dropdown]

Part III ALE Member Information—Monthly

Same Minimum Essential Coverage settings for all 12 months?



13 Items										
Month	(a) Minimum Essential Coverage Offer Indicator	Full Time Employee Count for ALE Member (Calculated)	Full Time Employee Count for ALE Member (Override)	Override to zero	Total Employee Count for ALE Member (Calculated)	Total Employee Count for ALE Member (Override)	Override to zero	(d) Aggregated Group Indicator	ACA ALE Group(s)	
January	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
February	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
March	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
April	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
May	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
June	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
July	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
August	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
September	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
October	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
November	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
December	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	0	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group	
All 12 Months	<input checked="" type="checkbox"/>							<input type="checkbox"/>		

Calculate 1094-C Total and Full Time Employee Counts By Month- this task will populate the FTE totals by month on the 1094-C Company config. However, due to your exclusion rule you will also need to make a copy of the report View 1094-C FTE and Total Count Details and add in a filter to pull in the correct totals.

- You can run this for each company all at once and it will run in the background. You can move to the next step while this task is running

Calculate 1094-C Total and Full Time Employee Counts By Month

Details

Year * 2024

Company *

Schedule

Priority

Run Once in the Future

Start Date

Start Time

Time Zone

Create ACA 1095-C/1094-C Data this will create all the data for the workers to populate on their forms.

- You can run this for each company all at once and it will run in the background. You can move to the next step while this task is running



Create ACA 1095-C/1094-C Data

Note: A company must have an ACA 1094-C Company Configuration.

Details

Year * 2024

Company *

Schedule

Priority x Normal

Run Once in the Future

Start Date MM/DD/YYYY

Start Time

Time Zone x GMT-08:00 Pacific Time (Los Angeles)

Make a copy of the Workday standard report- View 1094-C FTE and Total Count Details . Need to run it first to make a copy. Name the new report to Override- View 1094-C FTE and Total Count Details . Add in a filter to make sure you are excluding the Contingents and Interns from the 4 companies.

View 1094-C FTE and Total Count Details

Year * 2024

Company *

Month

Cancel OK

View 1094-C FTE and Total Count Details

Year 2024 Company

2644 items

Employee ID	Full Legal Name	Hire Date	Termination Date	Standard Report	Audits	Integration IDs	Layout	Web Service	Included in Summary	Included FTE C for M
-------------	-----------------	-----------	------------------	-----------------	--------	-----------------	--------	-------------	---------------------	----------------------

Standard Report > Copy

Audits > Run

Integration IDs > Schedule

Layout > ed in Summary

Web Service > Includ FTE C for M

Copy Standard Report to Custom Report

Name * Override- View 1094-C FTE and Total Count

Report Type Advanced

Data Source Active and Terminated Workers for ACA IRS Reporting

Temporary Report



Columns Sort **Filter** Subfilter Prompts Output Share Advanced

Filter on Instances

Filter conditions for filtering on instances 2 items

	Order	And/Or	(	*Field	*Operator	Comparison Type	Comparison Value
+ -	▼ ▼	And		x Worker is Employee	x equal to	x Value specified in this filter	<input checked="" type="checkbox"/>
+ -	▲ ▲	And		x Employee Type	x none in the selection list	x Value specified in this filter	x Intern

Columns Sort Filter Subfilter Prompts Output **Share** Advanced

Specify sharing options for the report definition

Report Definition Sharing Options (empty)

- Don't share report definition
- Share with all authorized users
- Share with specific authorized groups and users

Run the new report- Override- View 1094-C FTE and Total Count Details. You will need to run it once for each company. You do not need to fill out the Month prompt as all months will be included. Download the report to excel as you will need to make counts for each month on the report.

- Use this formula at the bottom of the last row of data starting under column 5 and use it for every column after this one.
 - o =COUNTIF(E2:E670,"yes")- you will need to adjust the cell range though. You just need to start at the bottom and then click on the top to get that whole range. You can then copy paste this formula to each consecutive cell.
- This report only pulls in current Employees. This does not account for COBRA recipient data you need to use the EIB to upload. If those recipients need to also be included in these counts, you will need to add those numbers manually after you get the counts in the excel export.

[Edit ACA 1094-C Company Configuration](#)- this is taking the counts you found in the above report to override the values Workday populated for Part III.

Edit ACA 1094-C Company Configuration

ACA 1094-C Company Configuration *

Cancel OK



Part III ALE Member Information—Monthly

Same Minimum Essential Coverage settings for all 12 months?

13 items

Month	(a) Minimum Essential Coverage Offer Indicator	Full Time Employee Count for ALE Member (Calculated)	Full Time Employee Count for ALE Member (Override)	Override to zero	Total Employee Count for ALE Member (Calculated)	Total Employee Count for ALE Member (Override)	Override to zero	(d) Aggregated Group Indicator	ACA ALE Group(s)
January	<input type="checkbox"/>	1771	<input type="text" value="0"/>	<input type="checkbox"/>	1781	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
February	<input type="checkbox"/>	1814	<input type="text" value="0"/>	<input type="checkbox"/>	1822	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
March	<input type="checkbox"/>	1840	<input type="text" value="0"/>	<input type="checkbox"/>	1853	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
April	<input type="checkbox"/>	1885	<input type="text" value="0"/>	<input type="checkbox"/>	1893	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
May	<input type="checkbox"/>	1897	<input type="text" value="0"/>	<input type="checkbox"/>	1907	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
June	<input type="checkbox"/>	1954	<input type="text" value="0"/>	<input type="checkbox"/>	1965	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
July	<input type="checkbox"/>	1995	<input type="text" value="0"/>	<input type="checkbox"/>	2003	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
August	<input type="checkbox"/>	2033	<input type="text" value="0"/>	<input type="checkbox"/>	2040	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group
September	<input type="checkbox"/>	2054	<input type="text" value="0"/>	<input type="checkbox"/>	2060	<input type="text" value="0"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2024 - 2024 ALE Group

Helpful Reports for Corrections and COBRA input:

- The ACA 1095-C Form/Box Tester- Provides a quick, real-time view of a single worker's 1095-C data, based on the worker data as of the current date
 - o Note: If worker data has changed after 1095-C data was created, the data viewed on this report may differ from the data on returned on View ACA 1095-C Form Data or View ACA 1095-C Form Recipient Data
- The View ACA 1095-C Form Data report only shows data created via the Create ACA 1095-C/1094-C Data task. It does not include participants loaded via the EIB.
- The View ACA 1095-C Form Recipient Data report shows ALL ACA data -- the data created via Create ACA 1095-C/1094-C Data task and the data corrected or loaded new via the EIB.
- The View Current 1095-C Form Recipient Data returns the same data as View 1095-C Form Recipient Data, but returns the most recent 1095-C form only (as opposed to all 1095-C forms a worker may have); can only be run for one company at a time

The report View ACA 1095-C Form Recipient Data, is the one to use if you need to correct any data for employees. This also gives you a very good look at how the Import EIB file will need to be populated as when loading in COBRA information.

Maintain ACA 1095-C Sorting Setup- if you wish to sort your Created ACA forms by Location, Company, Zip Code or Employee status, you can use this task to change the sorting of forms. This also allows you to split those sections up into their own grouping of PDFs.

- Please note if you have 500 locations, this could create 500 different PDF groups. View Created 1095-C Forms will allow you to view the run groups each time you ran the task Create ACA 1095-C Forms

Access the **Create ACA 1095-C Forms** task. This creates a PDF document of all the 1095 forms for the company to use and mail out. This can be primarily used for sending forms to Terminated Employees or External Recipients.

Run this task only after employee and dependent data is up to date in Workday and you're ready to send completed forms to the IRS. If you make changes to ACA data after creating 1095-C forms, data in Workday might no longer match the submitted forms.



- 1) To send printed 1095-C forms to the IRS, select the **Unmask Social Security Numbers** check box. This option displays SSNs in the generated PDF.
- 2) To include active employees who receive the electronic version, select the **Include Workers Opted-Out of Paper Copy** check box. Workday always includes terminated employees

(Optional) Access the **Publish Employee 1095-C Form** task.

Release the forms to self-service employees for viewing and printing the PDF. This allows for a date to be set so employees can view the file. That's all this task does. This way the company doesn't need to mail the forms, they can be accessed through Workday.

Workday Community Links to help Manage the Process: (some of these links may be no longer available as Community evolves)

- Affordable Care Act (ACA) Checklist- <https://community-content.workday.com/content/workday-community/en-us/kits-and-tools/products/human-capital-management/benefits/affordable-care-act-aca-checklist.html>
- Setup- ACA Forms 1094-C and 1095-C- <https://doc.workday.com/admin-guide/en-us/human-capital-management/benefits/patient-protection-and-affordable-care-act/kur1438038157688.html>
- Guide- Create ACA Company Configuration- <https://doc.workday.com/admin-guide/en-us/human-capital-management/benefits/patient-protection-and-affordable-care-act/geg1494227108009.html> - ACA Import 1095-C Instructions (has some screenshots)- <https://community-content.workday.com/content/workday-community/en-us/kits-and-tools/products/human-capital-management/benefits/1095-c-import-instructions.html#accordion-c42bd79841-item-7238f3333b>
- ACA Import 1095-C Instructions (has some tips and common errors)- <https://doc.workday.com/admin-guide/en-us/integrations/enterprise-interface-builder-eib-/inbound-eib-template-guidelines-and-troubleshootin/benefits-administration-eibs/izq1673871702850.html>
- Setup- ACA Connectors- <https://doc.workday.com/admin-guide/en-us/integrations/hcm-connectors/affordable-care-act-aca-connector/chr1453762095823.html>
- Additional Information on ACA Connector- <https://doc.workday.com/admin-guide/en-us/integrations/hcm-connectors/affordable-care-act-aca-connector/chr1453762094823.html>
- Troubleshooting the ACA Connector- <https://doc.workday.com/admin-guide/en-us/integrations/hcm-connectors/affordable-care-act-aca-connector/tzx1578956580633.html?toc=8.3.3>

****Notes****- for a worker to be properly calculated for the calendar year (this is typically for implementations or acquisitions) they need to be in the company for that full calendar year. So if hired 5/1/2019 and active until 10/25/21 and had Orgs assigned 4/1/21, they will only start calculating on the 1095 after 4/1. Those org assignments need to be at least effective 1/1/21, or should have been assigned and effective on their hire date