


Form 1095-C Configuration

Certain settings in the employee setup needs to be configured for us to be able to print a form 1095-C for an employee. This includes:

- Employee Free Form Comments
- Employee Contacts
- Employee Check Marks



Configurations must be done or completed first before importing the XML file for the form 1095C. Otherwise, check marks will not be displayed in the form.

Employee Freeform Comments

Freeform comments, be it in an employee or company level, needs to have the heading to be configured first. This is a one-time setup, that once added into the system through a certain employee, these headings will then be readily available and visible across all employees.

Listed in Table 1 below are the needed configurations in the Employee Freeform comments tab of the employee setup. These comments will hold the information needed in the printing of form 1095-Cfor the completion of the form boxes 14, 15, and 16, as well as the Plan Start Month field in the Part II of the form 1095-C (Refer to Figure 1).

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

: Part II Employee Offer Coverage of the Form 1095-C

Freeform Comment Fields	Description / Heading
EE Freeform Comment 11	Plan Start Month
EE Freeform Comment 12 - 24	Box 14 All Months - Box 14 Dec
EE Freeform Comment 25 - 37	Box 15 All Months - Box 15 Dec
EE Freeform Comment 38 - 50	Box 16 All Months - Box 16 Dec

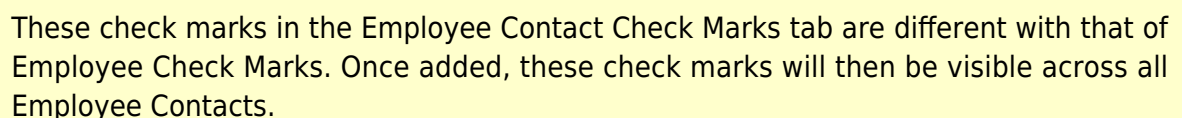
Table 1: Employee Freeforms for form 1095-C

Basically, when you have all the free form comments configured and already have some information pertaining to the appropriate fields, your Employee Free Form Comments would look like the image in Figure 2.

Figure 2: Employee Free Form Comments showing Free Form Comments #s 11 – 16.

Part III of the form, requires check marks to note if a beneficiary has been covered with a health insurance for specific month.

- 1. Edit an existing contact and go to the Check Marks tab.
- 2. In the grid, click anywhere and do the right-click.
- 3. From the menu, you can select [Add] to add new check mark field, [Delete] if to delete an existing check mark, or [Rename] an existing check mark. This time, select [Add].



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- Printed on 2024/04/14 03:35 (0 seconds ago)

code, if applicable

Part III Covered Individuals

If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee.

(a) Name of covered individual(s)	(b) SSN or other TIN	(c) DOB (if SSN or other TIN is not available)	(d) Covered all 12 months	(e) Months of Coverage												
				Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	
17			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 5. To fill in the information, simply click on the check box and a date will then appear beside the box. By default, it will be the current date. However, you can change the date by simply double-clicking on the date to invoke the date screen and be able to select a date. You can choose a date from the past or in the future.

Date

☒ 10/02/2017

Item

ALL

☐

JAN

☐

FEB

☐

MAR

☐

APR

☐

MAY

☐

JUN

☐

JUL

☐

AUG

☐

SEP

☐

OCT

☐

NOV

☐

DEC

☐

Select a Date...

October 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: 10/2/2017

>>

No Date

Ok

Cancel

- 6. So, in the image shown in #5, a check mark is set on Oct 2 ,2017. This will then appear in the form 1095-C of an employee to have a check mark in the column (d) Covered all 12 months of his beneficiary.

Employee Check Marks

As stated previously, this tab is different from that of the Employee Contact’s Check Marks tab. This is on a per employee level. Configuration needed in this module is a check mark for the Covered Individuals check box of the form 1095-C (Part III) as well as the Monthly Coverage information of the employee.

Contacts Payroll Items Accumulators Benefits Direct Deposit Payroll Notes Lookup Words Free Form Comments Comments Check Marks Pay Histo

Date	Item
<input type="checkbox"/> 12/31/2017	COVERED INDIVIDUALS

To check or uncheck the box, click on the box and a calendar will prompt, for you to be able to change or leave the date as it is.

Form Import

Before importing the XML file, you need to complete the configurations stated above. Otherwise, check marks will not be displayed in the form.

To import the XML file, go to Forms and Reports > Payroll Designer Then click the [Import] button

Limitation

Once you have all the configurations added, you are now ready to enter necessary information for each employee. Currently, we must do it individually for there is no option that we can do an import/export of information to fill in those comment boxes.

Also, only pages 1 and 3 of the form 1095-C is available in the system.

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Last update: **2017/11/17 20:48 (6 years ago)**

