



AVIONTÉ
Staffing & Recruiting Software

2020: Avionté ACA End of Year Filing

Zoom Webinar Interaction Tools

Question and Answer

All questions (3) My questions (1)

Rachel Graff 09:40 AM
Can I customize the options in the Stage drop-down?
This question has been answered live

Sean Ree 09:40 AM
Are there any know;edge base articles about this topic?
Collapse all (1) ^

Brenda Peterson 09:41 AM
Yes there are! I'll chat out links near the end of class.

You 09:41 AM
Are you going to cover check corrections?
Collapse all (1) ^

Brenda Peterson 09:41 AM

Type your question here...

Send anonymously Cancel Send

Zoom Webinar Chat

From Rachel Graff to All panelists and attendees:
Hello!

From Brenda Peterson to All panelists and attendees:
Have you logged into AvionteBOLD today?

From Rachel Graff to All panelists and attendees:
No

From Me to All panelists and attendees:
Not yet

From Sean Ree to All panelists and attendees:
Yes

To: All panelists and attendees v

Your text can be seen by panelists and other attendees





Chat “yes” if you can hear me and see this slide.



About Me

- Kristina Langsten
- Product Trainer with Avionté
- Part of the Avionté family for over 2 years!
- Focus on taxes, ACA and year-end
- Currently binge-watching Sleepy Hollow on Hulu.

Disclaimer

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Agenda



Year-End Preparation



ACA Reporting & Filing



Troubleshooting 1095-Cs



Helpful Resources



Q&A

Expectations to Ensure Success

- ✓ Attend at least one full year-end ACA EOY Webinar
- ✓ Plan ahead and be aware of Due Dates
- ✓ Consult the Knowledge Base
- ✓ Stay in the Know



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Year-End Preparation

Separate Processes

Taxes

- W-2s
- 1099s

ACA

- 1095-Cs
- 1094-Cs

Before you get started ...

- ✓ Determine your ALE status
- ✓ Must use Avionté as your **Back Office/Payroll** solution and track information properly in your database
- ✓ Must be on **Greenshades Basic Package with Avionté**
 - Allows you to pass XML file to Greenshades for quarterly and annual filings
 - If you are self-hosted, must download Tax Filing Center at [greenshades.com](https://www.greenshades.com)
- ✓ Must have ACA Package and set up ACA Companion Application

What is the ALE Status?

- If you were considered an ALE in 2020, you will need to furnish 1094 and 1095-Cs to the IRS and your employees
- Check out [ACA Information Center For Applicable Large Employers \(ALEs\)](#) for assistance determining your status.



50 Full Time Employees

OR



15 Full Time Employees

plus



35 Full Time Equivalent Employees

Applicable Large Employer (ALE)

What is Greenshades?



Payroll Tax Filing Solution

Avionté partner accessed from the core application

Can e-File quarterly and year-end Federal forms like 1095-Cs, W-2s, 940 & 941

Can build quarterly and year-end state and local filings like unemployment and W-2s

Optional additional service for printing/mailing employee year-end forms

Important Dates

March 2nd, 2021

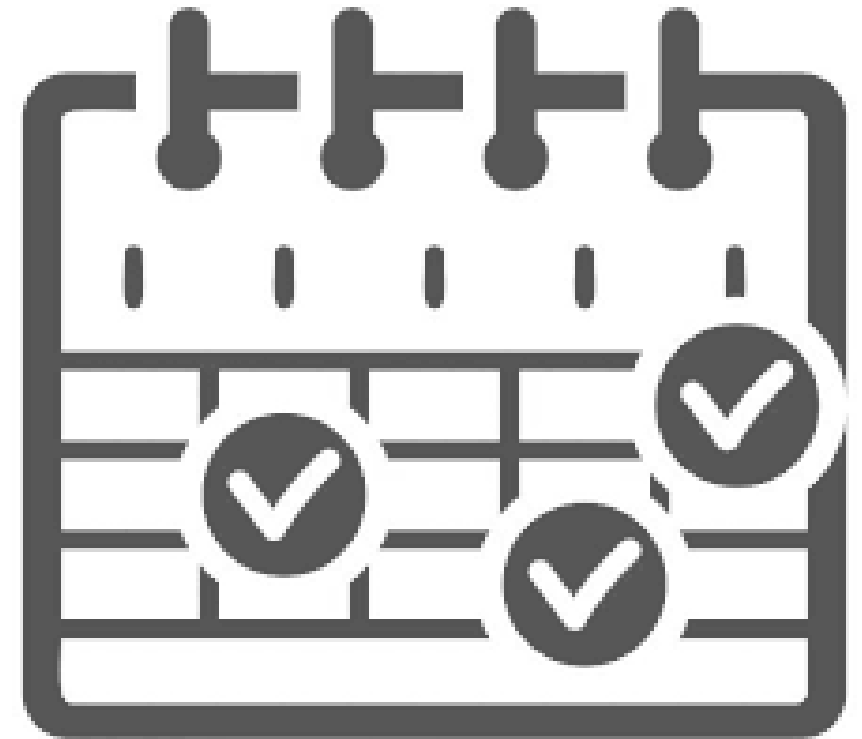
- 1095-Cs due to employees
- 1099s mailed and filed
- States that require forms due to employees earlier: **NJ, DC, RI**
- CA Due 1/31

March 1st, 2021

- Employer 1094-C (Mailing)

March 31st, 2021

- 1094-C due to IRS if filing electronically



Updates to 2020 1095-C

- New fields added which include:
 - Employee's age as of January 1
 - Part II, Line 14 --> Zip code for primary residence (Line 14: 1L, 1M, or 1N) OR primary employment (Line 14: 1O, 1P or 1Q) for each month
- Code 1L-1S added to Line 14 for Individual Coverage Health Reimbursement Accounts (ICHRA)
- Part III is now on page 3 with instructions on page 2

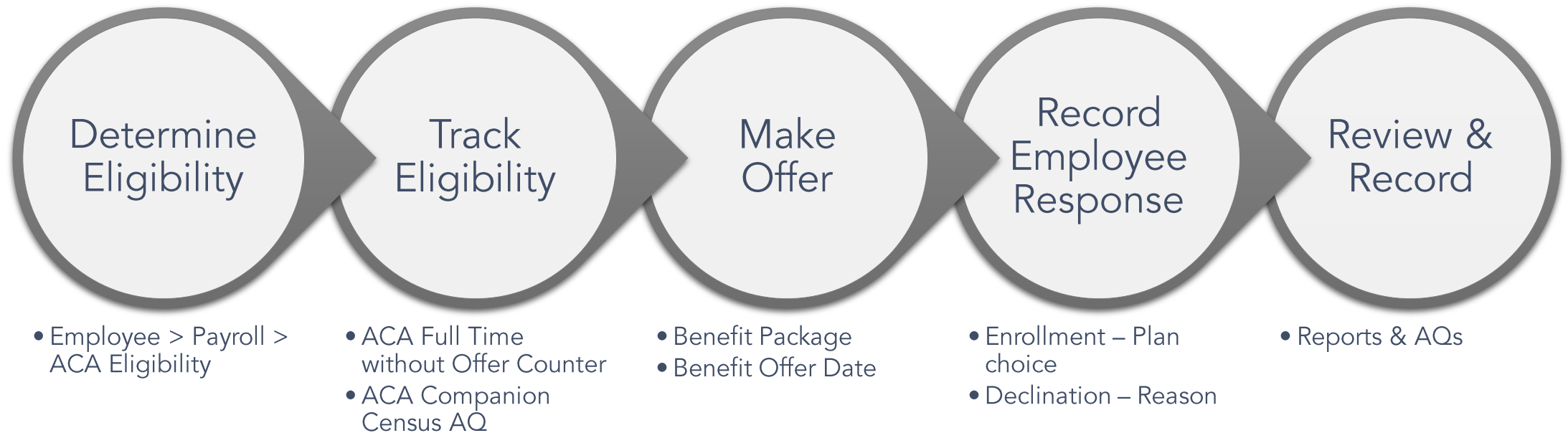
[IRS 1095-C instructions](#)

[My Tax Form: Codes and Definitions](#)

The background is a solid blue color. On the left side, there are several overlapping, dark blue, organic shapes that resemble stylized leaves or abstract forms. One large shape is at the top left, and another is at the bottom left. A circular shape is positioned in the lower center of the frame.

ACA Reporting

Daily Tracking Process



ACA Eligibility

Best Practice: Make determination upon assignment!

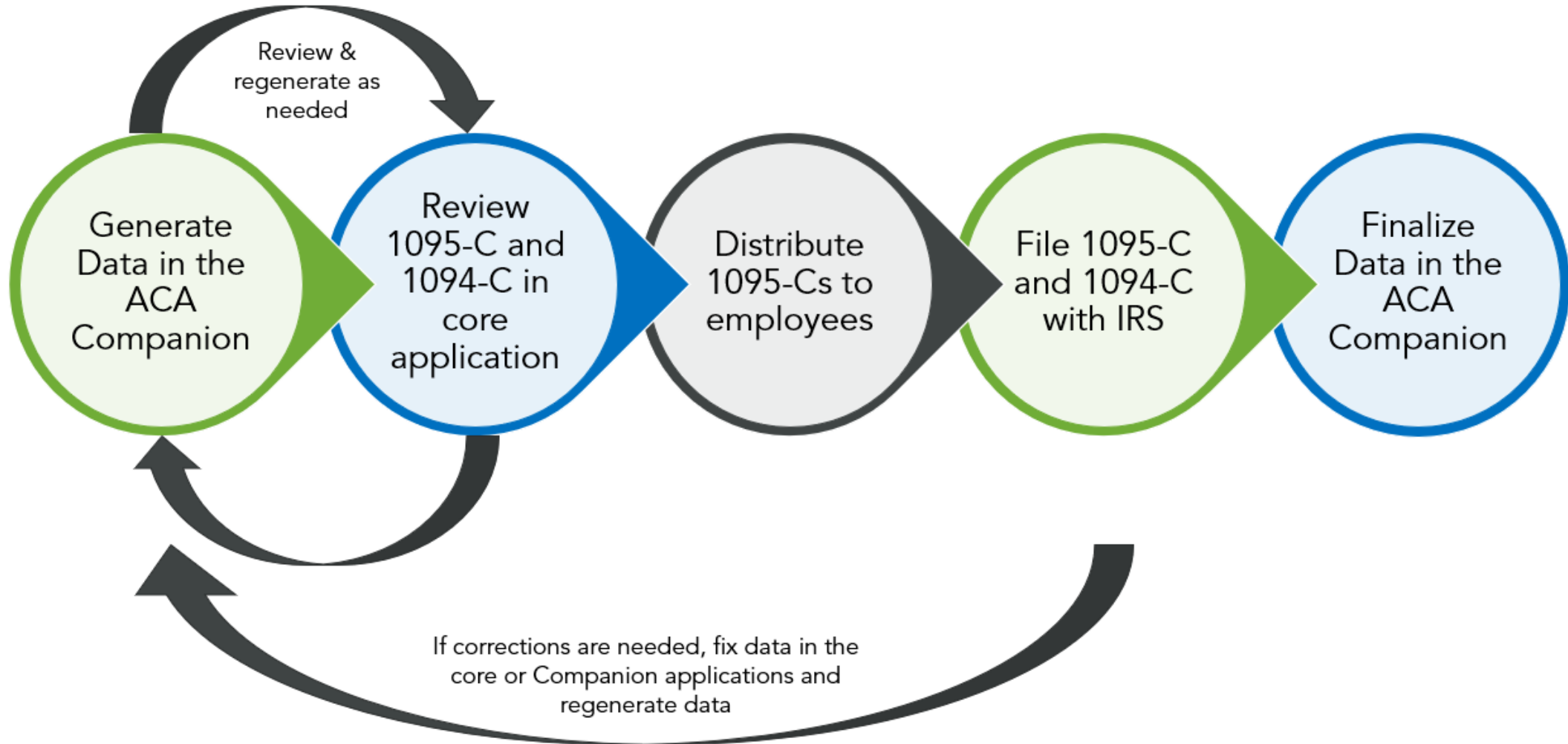
- Only if employee is considered Full-Time when they start, switch them to 'Yes'

The screenshot displays the Avionté software interface for ACA Eligibility. The top navigation bar includes 'Employee', 'Resource Type' (Set Processed), 'Search Type' (Set Name), and 'Search Criteria'. The main menu on the left lists various functions, with 'ACA Eligibility' highlighted. The central area shows a form with a dropdown menu for 'Is employee ACA eligible?' set to 'No'. Below this is a table titled 'Completed Employee Eligibility Measurements' with columns for Employer, Measurement type, Measurement start date, Measurement end date, Total hours, Measured eligibility, Admin period start date, Admin period end date, Stability period start date, Stability period end date, Active measurement?, and Reason for deactivation. The table contains three rows of data for an employee named 'test'.

Employer	Measurement type	Measurement start date	Measurement end date	Total hours	Measured eligibility	Admin period start date	Admin period end date	Stability period start date	Stability period end date	Active measurement?	Reason for deactivation
test	Initial	12/09/13	12/09/14	100.00	Full time	12/13/13	12/12/14	12/16/13	12/14/14	<input checked="" type="checkbox"/>	Employment terminated...
test	Standard	12/09/14	12/09/15	100.00	Full time	12/12/14	12/11/15	12/14/14	12/12/15	<input type="checkbox"/>	Employment terminated...
test	Standard	12/09/15	12/09/16	100.00	Full time	12/11/15	12/09/16	12/12/15	12/09/16	<input type="checkbox"/>	Employment terminated...

ACA Eligibility Dropdown:
Refers to whether or not the
employee is ACA Full Time,
not if you offered insurance.

ACA Reporting Process Overview



Report Preparation

ACA data preparation for reporting

For each ACA employer, use the options below to generate ACA data for review. Once the data has been reviewed and approved, finalizing the data makes the data available for reporting purposes.

Avionté	2016 data last generated on 12/31/2016 by jon.doe with errors	View errors	Generate data	
Best Buy	2016 data last generated on 12/31/2016 by jon.doe with errors	View errors	Regenerate data	Finalize data
Target	2016 data last generated on 12/31/2016 by jon.doe with errors	View errors		Finalized



Generate Data

- Pushes data into reporting tables
- Run the 1095 C and 1094 C reports
- "Process"

Regenerate Data

- Updates reports if changes are made to reporting data
- MUST click any time you expect to see a report changed
- "Process"

Finalize Data

- Initiates corrections process
- Adjustments will result in a Corrected 1095-C form
- "Post"
- **** Do this after you receive confirmation email from IRS

Generate Data: ALE Information

Authoritative Transmittal indicator:
Report Preparation tab

Avionté ACA Companion

Home | Employee plan details | ACA employer | Insurance plan | Benefit package | Report preparation

ACA data preparation

For each ACA employer, use the data available for reporting purposes.

Year: 2017

zz

zzComp

zzzzzz

zzz

Alphabet Staffing

zzzzzz

XYZ Staffing

Tim Hortons Canada

ALE Member Information

Does this data represent the 1094-C authoritative transmittal for this ALE member? Yes No

Months	Minimum Essential Coverage offer indicator	Full-time employee count for ALE member	Total employee count for ALE member
January	<input checked="" type="radio"/> Yes <input type="radio"/> No	6 + <input type="text" value="0"/>	198 + <input type="text" value="0"/>
February	<input checked="" type="radio"/> Yes <input type="radio"/> No	6 + <input type="text" value="0"/>	207 + <input type="text" value="0"/>
March	<input checked="" type="radio"/> Yes <input type="radio"/> No	6 + <input type="text" value="0"/>	215 + <input type="text" value="0"/>
April	<input checked="" type="radio"/> Yes <input type="radio"/> No	6 + <input type="text" value="0"/>	207 + <input type="text" value="0"/>
May	<input checked="" type="radio"/> Yes <input type="radio"/> No	2 + <input type="text" value="0"/>	154 + <input type="text" value="0"/>
June	<input checked="" type="radio"/> Yes <input type="radio"/> No	3 + <input type="text" value="0"/>	156 + <input type="text" value="0"/>
July	<input checked="" type="radio"/> Yes <input type="radio"/> No	3 + <input type="text" value="0"/>	161 + <input type="text" value="0"/>
August	<input checked="" type="radio"/> Yes <input type="radio"/> No	4 + <input type="text" value="0"/>	177 + <input type="text" value="0"/>
September	<input checked="" type="radio"/> Yes <input type="radio"/> No	4 + <input type="text" value="0"/>	180 + <input type="text" value="0"/>
October	<input type="radio"/> Yes <input checked="" type="radio"/> No	10 + <input type="text" value="0"/>	190 + <input type="text" value="0"/>
November	<input type="radio"/> Yes <input checked="" type="radio"/> No	10 + <input type="text" value="0"/>	186 + <input type="text" value="0"/>
December	<input type="radio"/> Yes <input checked="" type="radio"/> No	11 + <input type="text" value="0"/>	252 + <input type="text" value="0"/>

Generate Cancel

Manual updates to 1094-C data allowed

Generating 1094-C/1095-Cs

Generate Data in
ACA Companion

Review 1095-Cs and
1094-C in Reports

- Get Employee 1095-C Info
AQ
- 1095 C Report
- 1094 C Report

Avionté ACA Companion

Home | Employee plan details | ACA employer | Insurance plan | Benefit package | Reports

ACA data preparation for reporting

For each ACA employer, use the options below to generate ACA data for review. Once the data is available for reporting purposes.

zz	2016 data finalized on 9/7/2017 by Kristine.Olson 2016 corrections have not yet been processed	Finalized Process corrections
zzComp	2016 data last generated 9/7/2017 by Kristine.Olson with errors	View errors Regenerate data Finalize data
zzzzzz	2016 data has not yet been generated	Generate data
zzz	2016 data has not yet been generated	Generate data
zzzzzz	2016 data has not yet been generated	Generate data
ABC Staffing Inc.	2016 data has not yet been generated	Generate data
zzzz	2016 data has not yet been generated	Generate data
Tim Hortons Canada	2016 data has not yet been generated	Generate data
zzzzzz	2016 data has not yet been generated	Generate data

You can start
doing this
now!

Reviewing & Distributing 1095-Cs

1095 C Report (No Instructions Page)

- Can print directly out of Avionté to send to Employees

1095 C Label Report

- Formats addresses of 1095-C recipients for 5160 address label paper

1094 C Report

- Can print directly out of Avionté to send to IRS

ACA Companion Census AQ

- Looks at offers of coverage in the Companion Application

- Done in Report section of Avionté core application
- [ACA Reports](#)
- Grant permission to view these reports in Admin Tools > Report
 - If report cannot be located in Admin Tools, input ticket to Support Center to deploy

Employee will receive a 1095-C if ...

- Employee had at least one paycheck as a W-2 within the year
- Employee has ACA service hours within the reporting year
- Employee had at least one Assignment in the reporting year
- Employee's ACA Eligibility was "Yes" at some point throughout the year
- Employee was enrolled in self-insured coverage for at least one full month throughout the year

OR

[Self-Insured Plan Definition](#)

The background is a solid blue color. On the left side, there are several abstract, organic shapes in a darker shade of blue. One large shape starts from the top left and curves downwards. Below it, there is a smaller circle. At the bottom center, there is another circle. The text is centered horizontally and positioned in the middle of the page.

E-Filing 1095-Cs & 1094-C

E-Filing the 1095-C & 1094-C

1. 'Generate' your data in the Report Generation tab in the ACA Companion
2. Fill out Company and Date
3. Generate Green Shades XML
 - Quarter = Q4 ACA
 - * Not "Feed & XML"
4. Launch Green Shades

The screenshot displays the Avionté ACA Companion software interface. The main window shows the 'ACA data preparation for reporting' section with a table of data for employer 'ZZ'. The table indicates that 2016 data was finalized on 9/7/2017 by Kristine Olson and that 2016 corrections have not yet been processed. A 'Generate data' button is highlighted in pink on the right side of the interface, corresponding to step 1 of the instructions.

The 'Green Shades' dialog box is open, showing the 'Company & Date' section (step 2) with the following values: STAFFING SUPPLIER: ABC, YEAR ID: 2016, and QUARTER: Q4 ACA. The 'File Type' section shows 'Yearly' and 'Quarterly' options with checkboxes for W2, 941, 940, SUTA, and 1099. The 'File Info' section shows the file name and destination folder. The 'File Action' section (step 4) includes buttons for 'Generate Feed & XML', 'Launch Green Shades', 'Browse Existing File', 'Generate XML' (step 3), and 'Flag as Complete'.

E-Filing the 1095-C & 1094-C

5. Create E-File Returns
6. Select Build checkbox for 1095-C
7. Click Next

The screenshot shows the 'Select Returns to File' screen in the Greenshades Tax Filing Center. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains navigation options: 'Your Upcoming Deadlines', 'Create E-File Returns' (highlighted with a '5'), 'View Filing History', 'View Recent Tax Changes', and 'Create Year-End Forms'. Below these is a green button labeled 'Engage Your Workforce' and the Greenshades logo with the tagline 'LET US HANDLE THAT'. At the bottom of the sidebar is a 'Settings' link.

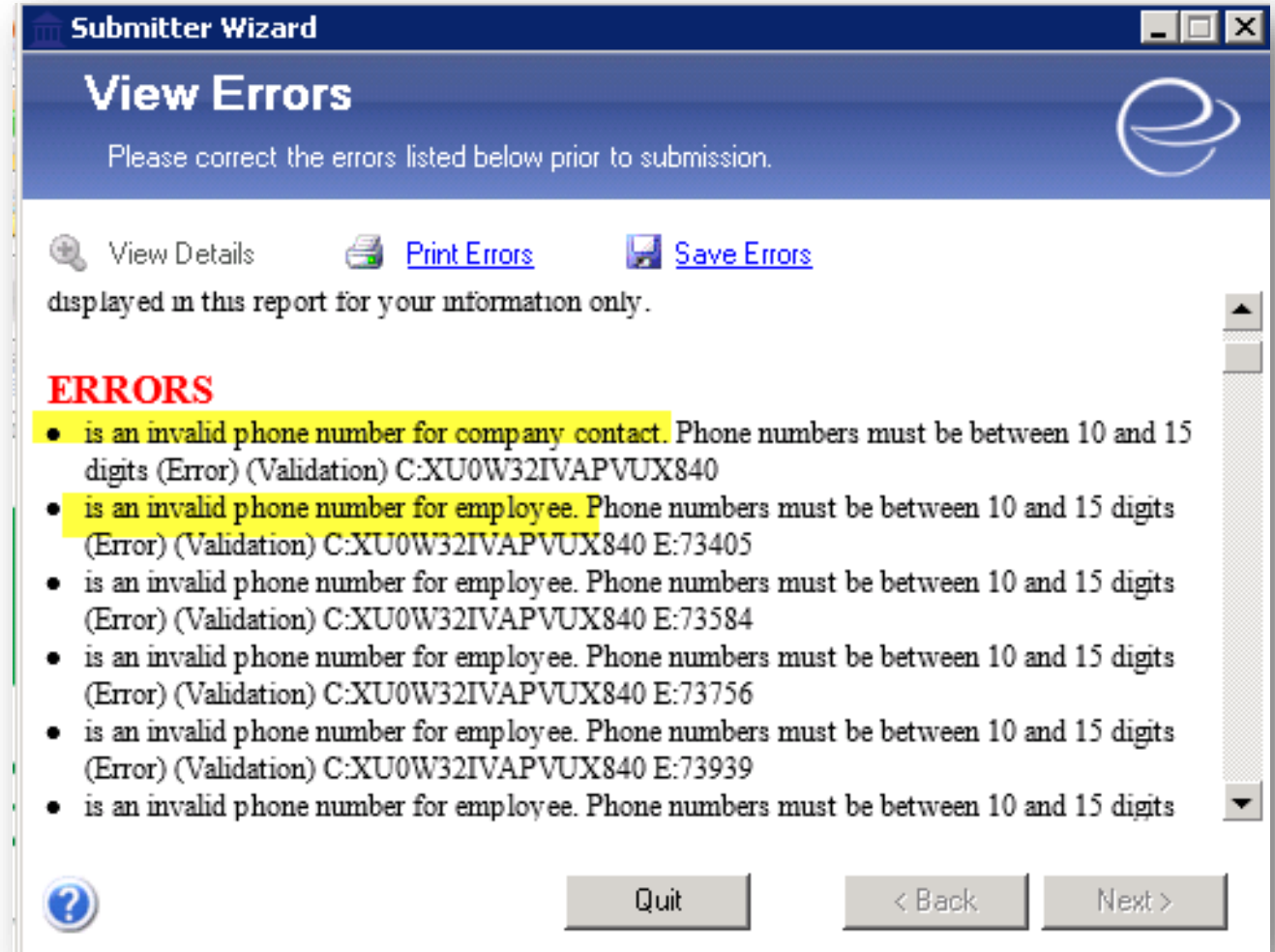
The main content area has a title 'Select Returns to File' and a subtitle 'Check the Build box for each file you wish to create and click 'Next''. Below this is a filter dropdown set to '1095-C' and a 'Select All' button. A table lists the returns to be filed:

Electronic Return	Status	Method	Build?
US - 1095-C	Awaiting Creation	Internet	<input type="checkbox"/>

The 'Build?' checkbox for the 'US - 1095-C' return is highlighted with a red box and labeled with the number '6'. Below the table is a checkbox labeled 'Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced)'. At the bottom of the main area are three buttons: 'Quit', '< Back', and 'Next >'. The 'Next >' button is highlighted with a red box and labeled with the number '7'. A large, faint graphic of a lightning bolt striking a document is visible in the background of the main area.

E-Filing the 1095-C & 1094-C

8. Resolve errors (if applicable)
 - Click to View Errors
 - **Best Practice: Resolve Errors within Avionté rather than in Green Shades**



E-Filing the 1095-C & 1094-C

9. Click to Begin Filing

The screenshot shows the 'Greenshades Tax Filing Center' interface. On the left is a navigation menu with options: 'Your Upcoming Deadlines', 'Create E-File Returns' (highlighted), 'View Filing History', 'View Recent Tax Changes', and 'Create Year-End Forms'. Below the menu is a green button that says 'Engage Your Workforce' and the Greenshades logo with the tagline 'LET US HANDLE THAT'. At the bottom left is a 'Settings' link.

The main area is titled 'Review Built Files' and contains the text: 'Select a built file below to submit or view errors.' and 'Click on the link to either submit or view errors for each E-Filing.' Below this is a table with columns 'Electronic Return', 'Status', and 'Combined Summary'. The table has one row: 'US - 1095-C' with a green checkmark and 'Employees: 2141'. A red box highlights the 'Click to Begin Filing' button in the 'Combined Summary' column. At the bottom right are 'Quit', '< Back', and 'Finish' buttons.

Electronic Return	Status	Combined Summary
US - 1095-C	✓ Employees: 2141	Click to Begin Filing

E-Filing the 1095-C & 1094-C

10. View & Save Totals

11. Click Next

US - 1095-C

Overall Totals

Total 1095-Cs	87
Total Employees Month 1	121
Full-Time Employees Month 1	2
Full-Time Employees Offered Minimum Essential Coverage Month 1	0
Total Employees Month 2	143
Full-Time Employees Month 2	85

E-Filing the 1095-C & 1094-C

12. Enter your Business Name Control (BNC)

13. Click Next


Provide Business Name Control

Provide your IRS-issued Business Name Control(s) below.

In order to E-File your return, please provide your IRS issued 'Business Name Control' (BNC). The BNC is a four digit code that is used to identify you as a taxpayer. Typically, it is the first 4 letters of your company name without spaces. If your company name has more than 2 words, please also exclude 'The'. If you are unsure of your BNC, [click here](#) to view the IRS guidelines on determining your BNC.

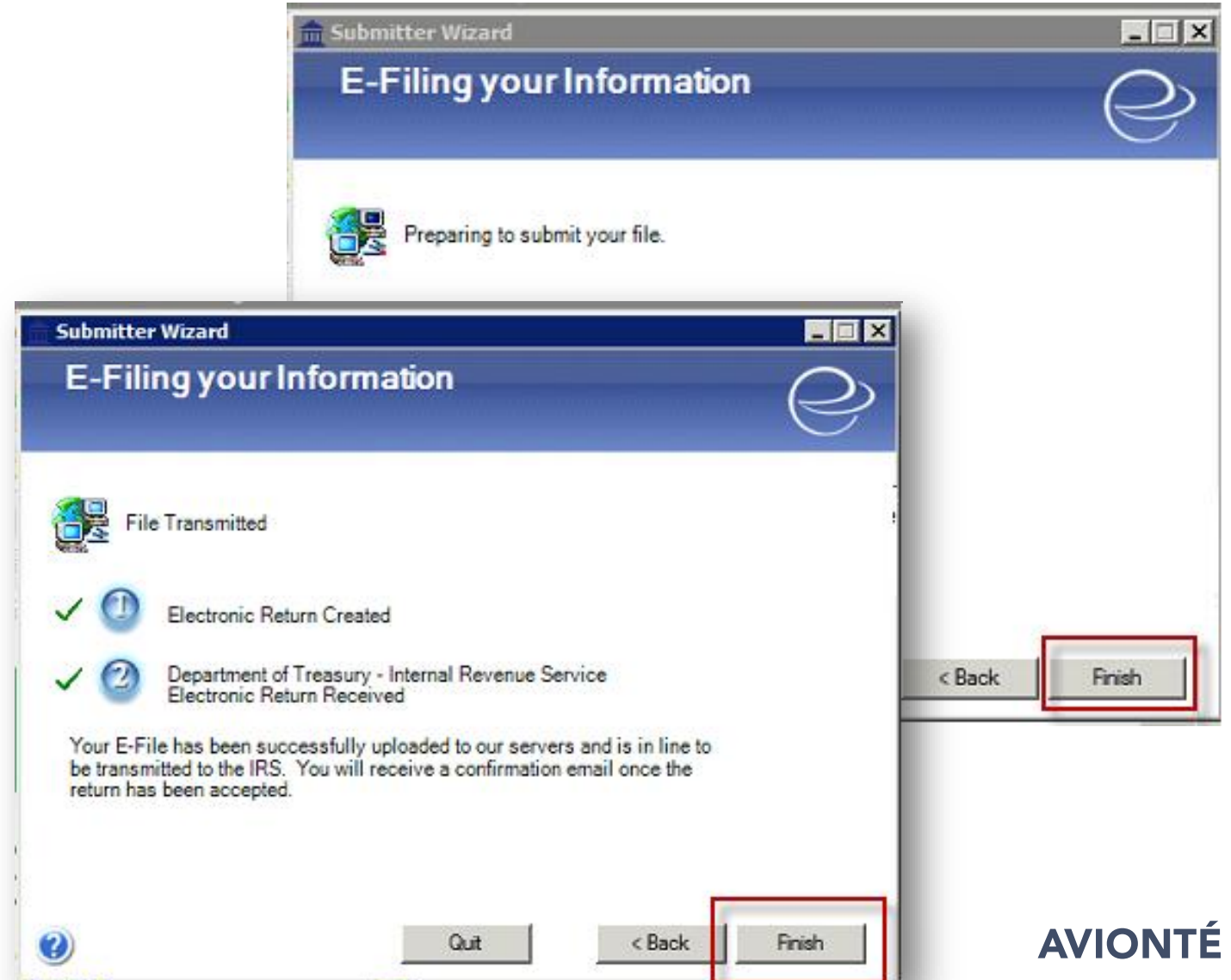
ABC Staffing Inc.

[Click here for Important Tax Information from the IRS](#)



E-Filing the 1095-C & 1094-C

14. Your file will then be submitted and a success confirmation will populate
15. Click Finish



The background is a solid blue color. On the left side, there are several overlapping, semi-transparent, darker blue shapes. These include a large, irregular blob-like shape that extends from the top left towards the center, and a smaller, solid circular shape located below it. The text 'ACA Troubleshooting' is centered horizontally and partially overlaps the larger shape on the left.

ACA Troubleshooting

"I can't find my employee in the Companion Application."

Manual Fixes

- Make fixes in core application
 - Name
 - SSN
 - Primary Address
- Reimport Employee Data
- Companion App > Home

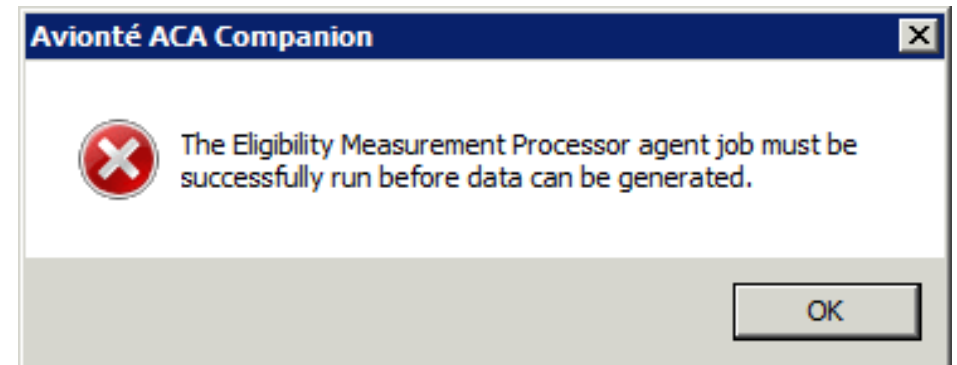
Mass Fixes

- Run ACA Companion Employee Sync Error AQ in Reports
- Displays Name, SSN, Address, Last Check Date
- Export AQ to Excel
 - Make edits to employee information
- Import spreadsheet via Import/Export main menu
- Reimport Employee Data
- Companion App > Home
- [Fix ACA Companion Application Employee Sync Errors](#)

“I’m seeing errors when generating reporting data.”

“The Eligibility Measurement Processor agent job must be successfully run before data can be generated”

- Reports cannot be run until you have successfully Finished the migration & the Companion’s eligibility measurement job has been run at least once
- Runs once every 60 minutes
- If persists longer, contact Avionté Support



“A form was not created for a full-time employee.”

Two common reasons:

1. Employee was never set to Yes for ACA Eligibility within the reporting year
 - **Fix Individual Employee Declaration Status:** Navigate to ACA Companion> Employee Plan Details> Manage Eligibility hyperlink
 - **Fix Multiple Employee Declaration Statuses:** Import Excel Spreadsheet with SSN, Status and Declaration Date (Available in November Release)
2. Employee's code combinations for Part II cause their 1095-C to be “thrown out”
 - Employee's form will be discarded by the system if Line 16 only displays a combination of 2As, 2Bs, 2Ds
 - **Fix:** Use the Part II Overrides to enter the employee's codes

Fix Individual Employee Declaration Status

1. Navigate to ACA Companion > Employee Plan Details > Manage Eligibility hyperlink
2. Be sure to select correct ACA Employer and Year
3. Select "Add New"

Avionté ACA Companion

Home | Employee plan details | ACA employer | Insurance plan | Benefit package | Report preparation

[Back to list](#)

Employee plan details | [Add a covered individual](#) | [Manage Eligibility](#) | [Manage 1095-C Overrides](#) | ACA employer | ABC Staffing Inc.

Employee | Eligibility

Individual's Eligibility Declarations

The grid below displays future, current, and past history of the employee's eligibility declarations. These represent manual overrides to the calculated eligibility measurements, and can be managed by making changes to the data below.

Individual Declarations

Employer	Status	DeclarationDate
----------	--------	-----------------

Year 2020

Employee Hank L.Aaron

Status

Declaration Date

Declared By

Last Modified By

[Manage Accepted Leaves of Absence](#)

[Add New](#) [Close Eligibility Tab](#)

Fix Individual Employee Declaration Status

4. Select Status:
 - FullTime – Form generated for year selected
 - PartTime – Form NOT generated for year selected
 - Undetermined - Form NOT generated for year selected
5. Select Declaration Date:
 - Date the status applied to employee
6. Select "Save"
7. Re-Generate data and review 1095-C reports

The screenshot shows the 'Avionté ACA Companion' web application. The main navigation bar includes 'Home', 'Employee plan details', 'ACA employer', 'Insurance plan', 'Benefit package', and 'Report preparation'. The current page is 'Employee plan details' for 'ABC Staffing Inc.'. The page title is 'Employee plan details' with links for 'Add a covered individual', 'Manage Eligibility', and 'Manage 1095-C Overrides'. The page is divided into 'Employee' and 'Eligibility' tabs. The 'Eligibility' tab is active, showing 'Individual's Eligibility Declarations'. A text box explains that the grid below displays future, current, and past history of the employee's eligibility declarations. Below this is a table titled 'Individual Declarations' with columns for 'Employer', 'Status', and 'DeclarationDate'. The table contains one row: 'ABC Staffing Inc.', 'FullTime', and '11/4/2020'. To the right of the table is a form for editing the declaration. The form includes fields for 'Employee' (Hank L. Aaron), 'Status' (FullTime), 'Declaration Date' (11/04/2020), 'Declared By' (avi-training.Cxr1), and 'Last Modified By' (avi-training.Cxr1). There are 'Edit' and 'Delete' links below the form. At the bottom right, there are 'Add New' and 'Close Eligibility Tab' buttons. At the bottom left, there is a link for 'Manage Accepted Leaves of Absence'.

Employer	Status	DeclarationDate
ABC Staffing Inc.	FullTime	11/4/2020

Year 2020

Employee Hank L. Aaron

Status FullTime

Declaration Date 11/04/2020

Declared By avi-training.Cxr1

Last Modified By avi-training.Cxr1

[Edit](#)

[Delete](#)

[Add New](#) [Close Eligibility Tab](#)

[Manage Accepted Leaves of Absence](#)

Fix Multiple Employee Declaration Statuses: Available in November Release

1. Create Excel spreadsheet with SSN, Status and Declaration Date

Headers need to be in this order

- F= FullTime Status Declaration
- P=PartTime Status Declaration
- Date format should listed in a way SQL can read

Example Formats:

YYYY-MM-DD

MM-DD-YYYY

*Wait until January 1st as some employees may fulfill their measurement periods before this time.

	A	B	C	D
1	SSN	Status	Declaration Date	
2	969583224	F	7/4/2020	
3	154668752	P	2/21/2020	
4	633255664	F	11/27/2020	
5				
6				

Fix Multiple Employee Declaration Statuses

2. Navigate to Avionté CLASSIC/Back Office> ImportExport
3. Select "New Batch"
4. Fill out fields as shown:
 - Description= Internal Note
 - Batch Status= Processing
 - Mapping Group= ACA Import EmployeeStatus
 - Processing Method= ACA Import EmployeeStatus
 - File= Saved Excel Spreadsheet
 - *Be sure to have spreadsheet closed in background
 - WorkSheet= Worksheet data is housed on in your spreadsheet
 - Check "WorkSheet Contains Column Names in First Row" if applicable
 - Fill out parameters for current filing year and Employer

Import Export Batch

Import Batch

Batch Name: 10/19/2020 3:54:53 PM

Description: test

Batch Status: Processing

Mapping Group: ACA Import Employee St

Processing Method: ACA Import Employee St

File: test_2.xlsx [Browse]

WorkSheet: Sheet1\$

WorkSheet Contains Column Names In First Row

Parameter

Parameter	Value
<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Year	2020
<input type="checkbox"/> Employer	Avi ACA 1 [12-3456789]
<input checked="" type="checkbox"/>	

Cancel Finish

5. Select "Finish"

No mapping required - once complete, re-Generate data in ACA Companion and review 1095-C Reports

“I still need to set up Insurance Plans and Benefit Packages.”

Avionté ACA Companion

Home | Employee plan details | ACA employee | **Insurance plan** | Benefit package | Report preparation

Insurance plan setup

For each employee health insurance plan offered, complete these settings.

[Add an insurance plan](#)

Plan name: Medden

Provider Name: Medden

Monthly employee only minimum contribution: Set amount \$ 1000.00 % of gross

Plan start month: January

Open enrollment start date: 12/20/2016

Open enrollment end date: 12/30/2016

Is this a self-insured plan? Yes No

Safe harbor code (opt.): 2F

Offer of coverage code: 1E

Plan summary

- Plan covers employee, spouse, and dependent(s).
- Provides ACA minimum essential coverage.
- Provides ACA minimum essential value.

Add

**ACA Companion >
Insurance plan tab**

Setting up Insurance Plans:

- Plan and Provider Name
- EE Monthly Contribution (Line 15 value)
 - What would an employee pay as a monthly premium to cover just themselves?
- Plan Start Month
- Open Enrollment Dates
- Self-insured?
- Safe Harbor Code (Line 16, Code Series 2)
- Offer of coverage Code (Line 14)

[Adding a New Health Insurance Plan](#)

“I still need to set up Insurance Plans and Benefit Packages.”

Plans to add

ACA Compliant Healthcare Plans:

- Minimum Essential Coverage Plans (MEC)
- Minimum Value Plans (MVP)
- PPO
- Healthcare Plan + HSA

DO not add:

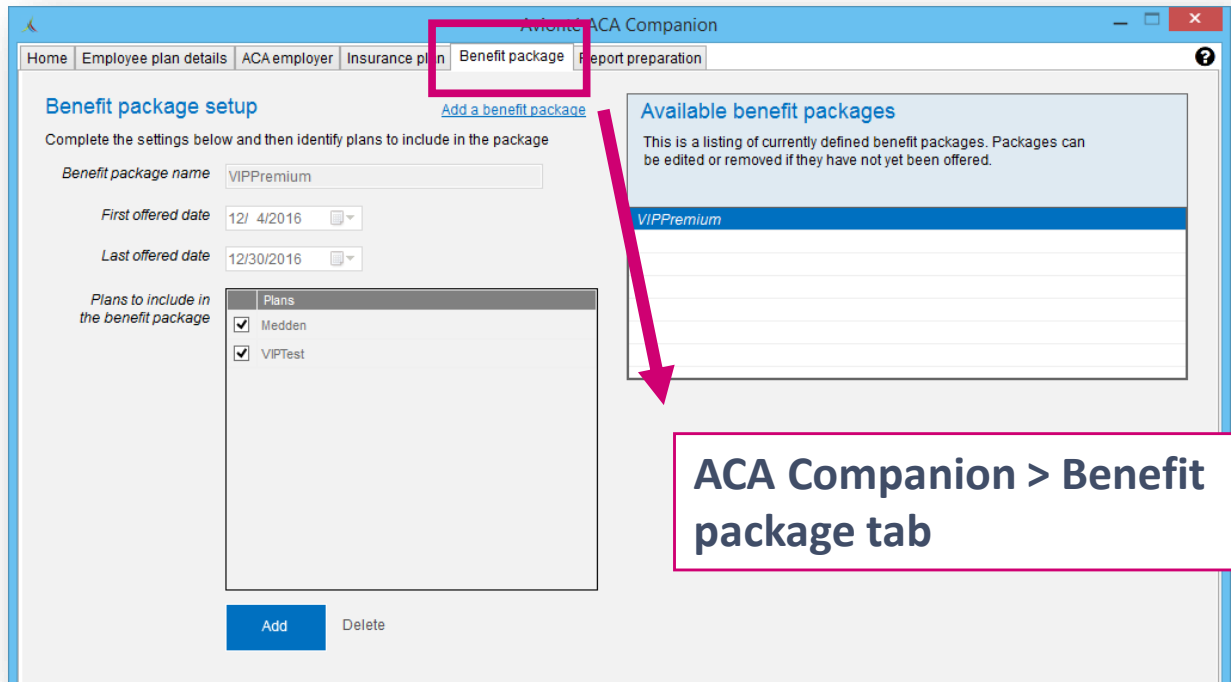
- Fixed Indemnity Plans
- Non Healthcare Plans
 - Dental
 - Vision
 - Life
- Tiers of Plans (optional)
 - EE + Spouse
 - EE + Children

I still need to set up Insurance Plans and Benefit Packages

Do I need to change my insurance plans or benefit packages each year? Yes!

- New offerings (plan options)
 - New plans in a package
 - No longer offering certain plans
- Rate changes for Employee Monthly Contribution
- Offer of coverage or Safe Harbor Code changes

“I still need to set up Insurance Plans and Benefit Packages.”



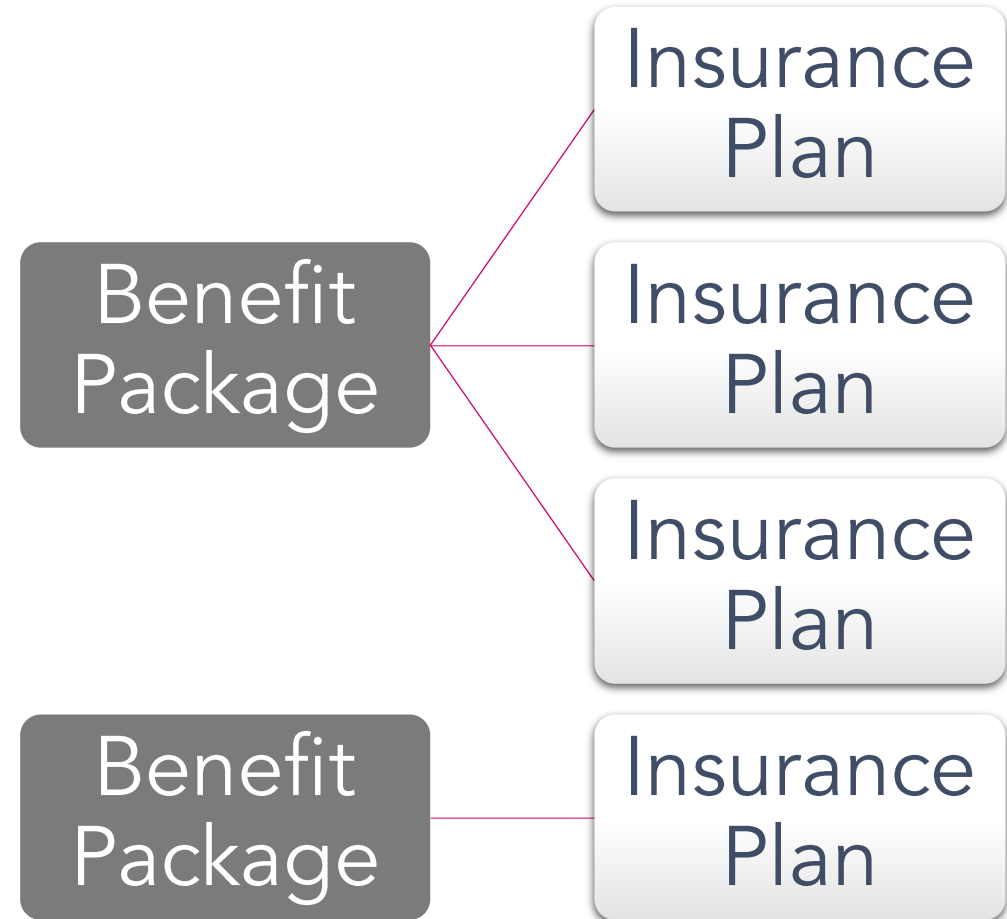
Setting up Benefit Packages:

- Benefit Packages comprised of one or more healthcare plans
- Healthcare plans can be included in more than one package

“I still need to set up Insurance Plans and Benefit Packages.”

Example of Benefit Packages:

- Internal employees v. external employees could have different packages offered



“The information in Part I is incorrect.”

600120

Form **1095-C**
Department of the Treasury

Employer-Provided Health Insurance Offer and Coverage

Do not attach to your tax return. Keep for your records.

VOID
 CORRECTED

OMB No. 1545-2251

2020

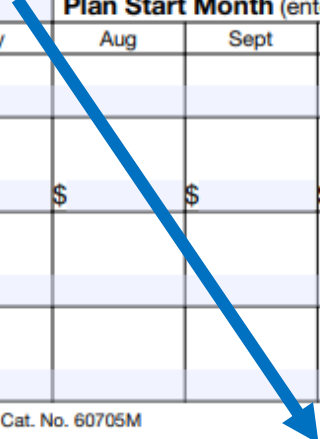
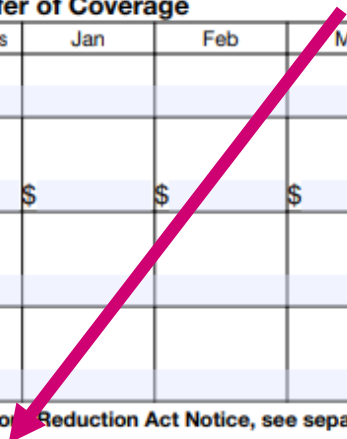
Part I Employee						Applicable Large Employer Member (Employer)					
1 Name of employee (first name, middle initial, last name)			2 Social security number (SSN)			7 Name of employer			8 Employer identification number (EIN)		
3 Street address (including apartment no.)						9 Street address (including room or suite no.)			10 Contact telephone number		
4 City or town		5 State or province		6 Country and ZIP or foreign postal code		11 City or town		12 State or province		13 Country and ZIP or foreign postal code	

Part II Employee Offer of Coverage	Employee's Age on January 1							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)													
17 ZIP Code													

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Cat. No. 60705M

Form **1095-C** (2020)



CLASSIC > Employee > Details
BOLD > Employee Record

ACA Companion > ACA Employer

“I don’t understand the codes on Line 14.”

600120

Form **1095-C**
 Department of the Treasury
 Internal Revenue Service

Employer-Provided Health Insurance Offer and Coverage
 ▶ Do not attach to your tax return. Keep for your records.
 ▶ Go to www.irs.gov/Form1095C for instructions and the latest information.

VOID
 CORRECTED

OMB No. 1545-2251
2020

Part I Employee				Applicable Large Employer Member (Employer)									
1 Name of employee (first name, middle initial, last name)		2 Social security number (SSN)		7 Name of employer				8 Employer identification number (EIN)					
3 Street address (including apartment no.)				9 Street address (including room or suite no.)				10 Contact telephone number					
4 City or town		5 State or province		6 Country and ZIP or foreign postal code		11 City or town		12 State or province		13 Country and ZIP or foreign postal code			
Part II Employee Offer of Coverage				Employee's Age on January 1				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)													

ons. Cat. No. 60705M Form **1095-C** (2020)

ACA Companion > Employee Plan Details

- 1H no offer that covers the full month
- 1A – 1I offer covers the entire month

[2020 Code Cheat Sheet](#)

“I don’t understand the amounts on Line 15.”

600120

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Department of the Treasury
Internal Revenue Service

Employer-Provided Health Insurance Offer and Coverage
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VOID
 CORRECTED

OMB No. 1545-2251
2020

Part I Employee					Applicable Large Employer Member (Employer)									
1 Name of employee (first name, middle initial, last name)			2 Social security number (SSN)		7 Name of employer				8 Employer identification number (EIN)					
3 Street address (including apartment no.)					9 Street address (including room or suite no.)				10 Contact telephone number					
4 City or town		5 State or province		6 Country and ZIP or foreign postal code		11 City or town		12 State or province		13 Country and ZIP or foreign postal code				
Part II Employee Offer of Coverage					Employee's Age on January 1					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)	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	

Cat. No. 60705M Form **1095-C** (2020)

ACA Companion > Employee Plan Details

- Blank = No offer covering the entire month
- \$ = Offer covering the entire month

ACA Companion > Insurance Plan

- \$ amount shown is taken from the *Monthly Employee Only Minimum Contribution*
- If multiple plans in a package, will use the \$ amount of the best value plan

[2020 Code Cheat Sheet](#)

“I don't understand the codes on Line 16.”

600120

Form **1095-C**
Department of the Treasury
Internal Revenue Service

Employer-Provided Health Insurance Offer and Coverage

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VOID

CORRECTED

OMB No. 1545-2251

2020

Part I Employee				Applicable Large Employer Member (Employer)										
1 Name of employee (first name, middle initial, last name)		2 Social security number (SSN)		7 Name of employer				8 Employer identification number (EIN)						
3 Street address (including apartment no.)				9 Street address (including room or suite no.)				10 Contact telephone number						
4 City or town		5 State or province		6 Country and ZIP or foreign postal code		11 City or town		12 State or province		13 Country and ZIP or foreign postal code				
Part II Employee Offer of Coverage				Employee's Age on January 1					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)														

instructions.

Cat. No. 60705M

Form **1095-C** (2020)

ACA Companion > Employee Plan Details

- 2C = Enrolled in coverage for full month
- 2F-2I = Offered a plan with a safe harbor code, but not enrolled

Core Application > Employee > Assignment

- 2A = No assignment touching any day of the month

Core Application > Employee > Payroll > ACA Eligibility

- 2D = Employee is in a measurement or admin period (has not yet been set to Yes of ACA Eligibility)

2020 Code Cheat Sheet

AVIONTÉ

Part II Overrides

- Manually alter codes on Lines 14, 15, or 16
- Done in ACA Companion under Employee Plan Details > Manage 1095-C Overrides
 1. Be sure to select correct ACA Employer and Year
 2. Click through and enter Line 14, 15 and 16 data
- Ability to mass override codes for multiple employees using an import

*With the enhancement to the ACA Companion, the previous method of using the employee's 'Extra Fields' will no longer work. To make any overrides in the future you will need to use the ACA Companion app.

Instructions for individual overrides: [1095-C Part II Overrides](#)

Instructions for mass overrides: Available in November Release

The screenshot shows the Avionté ACA Companion interface. The top navigation bar includes 'Home', 'Employee plan details', 'ACA employer', 'Insurance plan', 'Benefit package', and 'Report preparation'. The 'Employee plan details' section is active, showing 'Employee' and '1095-C Overrides' tabs. The 'ACA employer' dropdown is set to 'ABC Staffing Inc.'. The 'Year' dropdown is set to '2020'. The main area displays a grid of months from January to December, each with fields for Line 14, Line 15, and Line 16. A 'Remove Override' link is present below each month's fields. At the bottom, there are buttons for 'Clear Changes', 'Save 1095-C Overrides', and 'Close Tab'. A pink box highlights the 'Manage 1095-C Overrides' link in the navigation bar, and a pink arrow points from it to the '1095-C Overrides' tab. Another pink box highlights the 'Year' dropdown, and a pink arrow points from it to the '2020' selection.

“I need to add or adjust information in Part III.”

(Now on page 3)

Form 1095-C (2020)

Part III Covered Individuals

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

	(a) Name of covered individual(s) First name, middle initial, last name	(b) SSN or other TIN	(c) 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
18				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23				<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"/>
24				<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"/>
25				<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"/>

ACA Companion > Employee Plan Details > Covered
Individuals

* Only required if self-insured! *

“I haven’t tracked any enrollments or declinations.”

- ACA Import

- Imports enrollments & declinations from an Excel spreadsheet
- Mapping required!

- ACA Declination Export AQ

- Enrollments must be added first (manual or through ACA Import)
- Adds declinations for all employees who worked in the reporting year & did not enroll
- Great for employers who offer to all employees upon hire!

A decorative graphic on the left side of the slide, consisting of a large, dark blue, irregular shape that resembles a stylized letter 'S' or a drop, and a smaller, solid dark blue circle positioned below it.

Helpful Resources

Additional Resources



On-Demand
eLearning



Tip of the Week



Knowledge Base



Recorded
Webinars

Knowledge Base Highlights

[ACA Directory](#)

- Links to helpful ACA year-end articles and training modules

[Taxes Directory](#)

- Links to articles about W-2 production and distribution, training modules, and Greenshades resources

[Year-End Section](#)

- Collection of KB articles specifically related to producing year-end reporting in Avionté

[Affordable Care Act Section](#)

- Collection of all articles related to the Avionté ACA solution

Additional Training

Year-End Taxes/W-2 Process

- Avionté EOY ACA and Tax/W2 Filing
- Attend again and bring your questions (as needed)
- Offered 1x a week, November-December
- Attend at least once
- **Registration Links: Tip of the Week**

Greenshades Year-End Forms

- Hosted By Avionté & Greenshades
- For those outsourcing (or considering outsourcing) form distribution to Greenshades
- Will occur twice in December
- **Registration Links: Tip of the Week**

* All other dedicated training session requests are billable



Q & A



AVIONTÉ

Staffing & Recruiting Software

Thanks for attending!