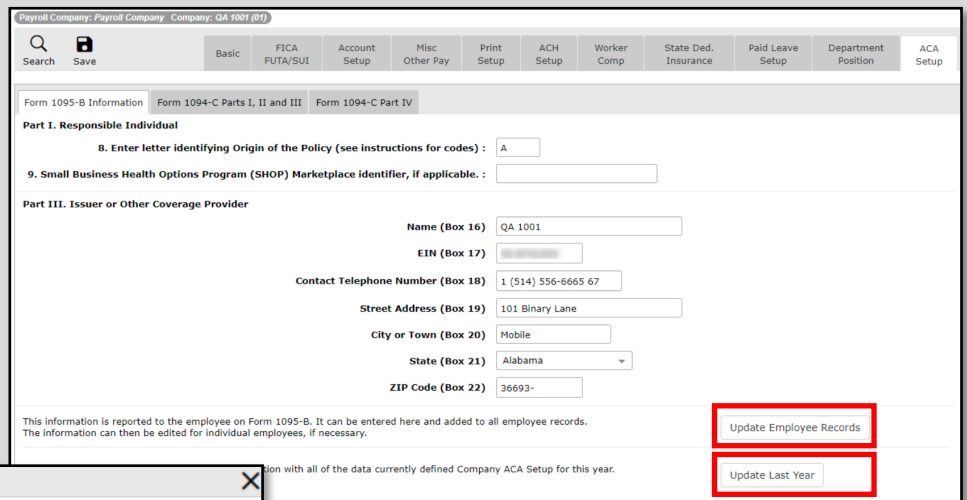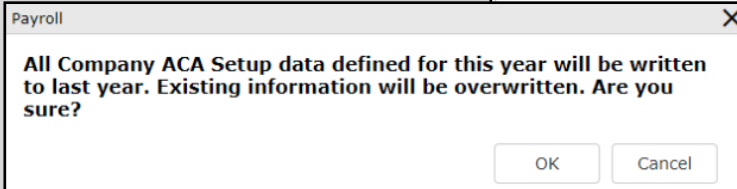## ACA (AFFORDABLE CARE ACT)

Add Permissions

- Navigate to Accounting > Maintenance > Employee > Permissions tab.
- Provide CREATE, READ and UPDATE permissions for Payroll > Reports > Year End > ACA > ACA Information Return.

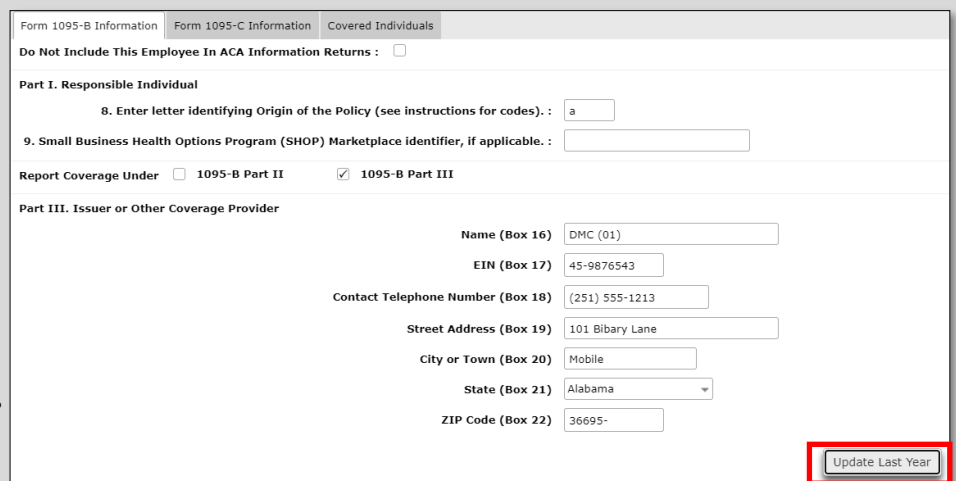### Maintenance of the Employee Payroll Records Company-wide

- Navigate to Payroll > Maintenance > Company Information.
- Select a Company from the grid.
- Click the **ACA Setup** tab.
- Edit all sub-tabs as needed.
- Clicking the [**Update Employee Records**] button applies the information to all Payroll employee records at once.
- Clicking the [**Update Last Year**] button updates the previous year ACA information with the data currently defined in the company ACA Setup tab. You will find this button on all three pages of the ACA Setup tab and all three serve the same function. You will be prompted to confirm that you want to overwrite last years data. Click [**OK**] to confirm.

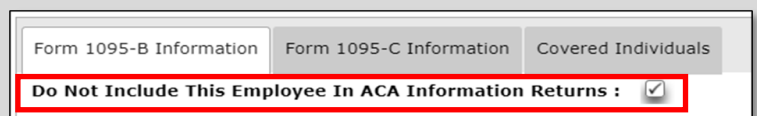### Maintenance of the Individual Employee Payroll Records

- Navigate to Payroll > Maintenance > Employee Information.
- For each Payroll Employee Record that deviates from the Company Information:
  - Search and select the Employee record.
  - Click the **ACA Setup** tab.
  - Edit all sub-tabs as needed.

*NOTE: Each tab and sub-tab must be updated independently. Click the [**Update Last Year**] button on each sub-tab where changes have been made.*

- Marking the **Do Not Include this Employee In ACA Information Returns** checkbox, will exclude that employee from the ACA submittal.

NOTE: The employee's Name, Address and Social Security Number as defined on the Employee record's Basic tab in the current year are used for the ACA forms.

ACA (AFFORDABLE CARE ACT)

Create an Original ACA Return Report

- Navigate to Payroll > Reports > Year End > ACA > ACA Information Return
- Click the [**New**] button in the Action Ribbon.
- Select a **Tax Year** from the dropdown.

*NOTE: The tax year must be closed (ie: Archived) to create an ACA report.*

- Select a **Form Type** based on your dealership's needs.
- Mark the *Original* checkbox as the **Submission Type** if this is the first return for the tax year.
- Click the [**Save**] button to open the ACA Info Return screen.

The left side of the screen displays the Report Status Tree.

The grid on the right side includes all Payroll Employees. Employees whose Payroll records have been marked **Do Not Include This Employee In ACA Information Returns** are listed with a red **X** in the *Warnings* column.

- Press the [**Validate**] button in the Action Ribbon. A red **!** icon warning symbol will be added to the grid for each record that did not validate. Hover over the warning symbol to see a ToolTip explaining the validation error.
- Click the blue hyperlink next to each record with a red **!** icon, and address each warning. Employee records with a warning will be included in the ACA report and submitted to the IRS.
- Click the [**Select All/Select None**] button in the Action Ribbon to select all payroll employee records to be included in the ACA Return Report.
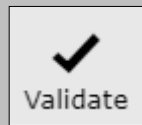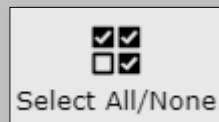
NOTE: Making no selection in the Select *column will Include all employee records.*

- Employee payroll records previously marked with for exclusion are automatically deselected. Manually deselect any additional Employee Records to exclude them from the ACA submission.

Generate and Submit Data

- Press the [**Generate Data**] button in the Action Ribbon. No changes are permitted to the report once the data has been generated. Employee records that were not marked in the *Select* column are removed from the list of employee records.
- Press the [**Update Status**] button in the Action Ribbon to open the ACA Info Return Status window.
- Input your TCC (Transmitter Control Code).
  NOTE: You will be defining the Receipt ID and the Status later on.
- Click [**Save**] to return to the ACA Info Return.
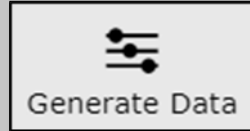
Test the Portal (Required One time only)

The IRS requires the dealership to submit a test prior to submitting the first ever ACA Report. **Only perform this test if you have NEVER submitted before**. The test confirms that subsequent submittals will succeed with properly prepared employee records.

To generate the test .xml files that you will send to the IRS, go to Payroll > Reports > Year End > ACA > ACA Information Return and click the [**Test**] button.

Open a separate tab to manually upload both files to the IRS website https://www.irs.gov/e-file-providers/affordable-care-act-information-returns-air.
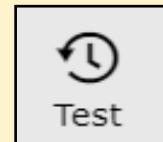
- Press [**Submission XML**] to generate the files that must be manually uploaded to the IRS. These files include the manifest and request files.
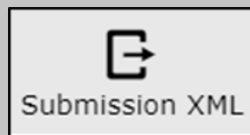
- Open a separate tab to manually upload both files to the IRS. Transmit files to IRS-(AIR) https://www.irs.gov/e-file-providers/affordable-care-act-information-returns-air .
- Click on the *User Interface Production System* link to upload the files.

Online AIR Systems

User Interface (UI) ACA Assurance Testing System (AATS)
Log in to upload your test forms or scenarios.

User Interface (UI) Production System
Log in to upload your 1094 and 1095 forms.

Update Status

- Click the [**Update Status**] button in the Action Ribbon to open the ACA Info Return Status window. The **Files** field will auto-populate.

- Enter the Receipt ID number from the IRS response.

- From the dropdown menu, select the Response Status that was provided in the IRS response.

- Click the [**Save**] button.

- If the submission is accepted, proceed to the **Print Employee Forms** procedure below.

- If corrections are needed, proceed to the **Create a Corrected ACA Return Report** procedure below.
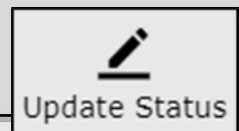
ACA Info Return Status

Files	1094B_Request_TZTN0_20210317T203325000Z.xml
	Manifest_1094B_Request_TZTN0_20210317T203325000Z.xml
TCC	12345
Receipt Id	
Response Status	Unknown

Accepted
Accepted With Errors
Rejected
Processing
Not Found
Submission Pending

Save   Cancel

Print Employee Forms

Once the return has been *Accepted* or *Accepted With Errors*, the Employee Forms may be printed.

- Navigate to Payroll > Reports > Year End > ACA > ACA Information Return.
- Click the line with the accepted report to open the **ACA Info Return** screen.
- Press the [**Employee Forms**] button to generate the forms. ACA form 1095-C with instructions is configured to print on plain paper with two pages per employee.

Create a Corrected ACA Return Report

Corrections must be made to a submitted (original) report that was *Accepted With Errors*.

- Navigate to Payroll > Reports > Year End > ACA > ACA Information Return.
- Click the block with the original report to open the **ACA Info Return** screen.
- Click the [**New**] button in the Action Ribbon.
- Mark the **Correction** checkbox as the **Submission Type** in the *New ACA Info Return* window.
- Click the [**Save**] button.
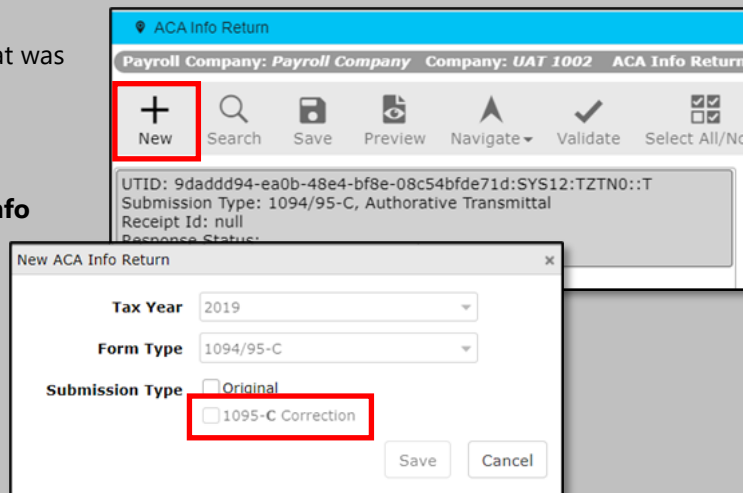
Correct an ACA Return Report - Corrected ACA reports will nest in the report status tree under the original submission. All files that were sent from the original report are included.

- Click the [**Validate**] button in the Action Ribbon.
- A red **!** icon will be added to the grid for each record that did not validate. Hover over the icon to see a ToolTip explaining the validation error.
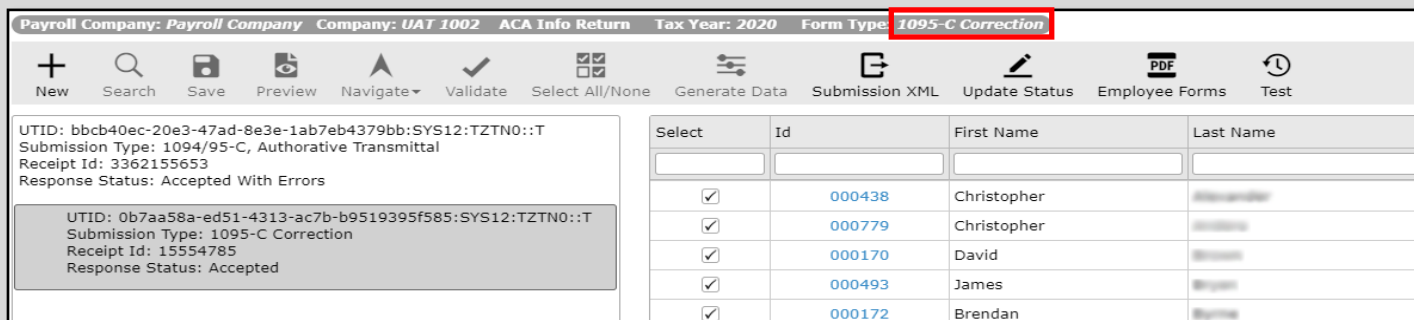
- Click the blue hyperlink next to each Employee Record with a **!** icon, and address each warning.
NOTE: Employee records with a Warning will be included in the ACA report and therefore submitted to the IRS.
- Each tab and sub-tab must be updated independently.
    - Click the [Update Last Year] button on each sub-tab where changes have been made.
- Click the [**Generate Data**] button in the Action Ribbon. No changes are permitted to the report once the data has been generated.
- Press the [**Update Status**] button in the Action Ribbon to open the ACA Info Return Status window.
- Input your TCC (Transmitter Control Code).
- Click [**Save**] to return to the ACA Info Return.
- Press [**Submission XML**] to create the XML files to be manually uploaded to the IRS.
- Open a separate tab to manually upload both files to the IRS website https://www.irs.gov/e-file -providers/affordable-care-act-information-returns-air.
- Click the *User Interface Production System* link to upload the files.
- When the IRS Responds, go to the **Update Status** procedure above.