

Affordable Care Act (ACA) Reporting

Prepare by enabling the option to Save Perpetual History in Payroll Setup now!

Adding new Crystal Report to help you determine if you are a large employer

Employers with 50+ Fulltime or Fulltime Equivalents are considered large employers and are required to report in January of 2016.

ACA Applicable Large Employer Report (ABC) 11/7/2014

Report Setting: STANDARD [Save]

Description: ACA Applicable Large Employer Report

Setting Options:

Type: Public [Print Report Settings] [Number of Copies: 1]

Default Report: [Three Hole Punch] [Collated]

[Earnings to Exclude...] [Print Seasonal Employees] [Print Totals Only]

Starting: [Period End Date: 1/1/2014] Ending: [Period End Date: 12/31/2014]

Selections:

Select Field	Operand	Value
Employee No	All	

Keep Window Open After: [HP Officejet 6300 series (redirected 2)] [Print] [Preview]

Ok Cancel

ACA Earnings to Exclude

Earnings Code	Description	Exclude
01	Regular	<input type="checkbox"/>
02	Overtime	<input type="checkbox"/>
03	Doubletime	<input type="checkbox"/>
04	Holiday	<input type="checkbox"/>
07	Sick Pay	<input type="checkbox"/>
08	Advance	<input checked="" type="checkbox"/>
10	Vacation Pay	<input type="checkbox"/>
11	Personal Day	<input type="checkbox"/>
20	earnings	<input type="checkbox"/>
21	no accrual	<input type="checkbox"/>

Ok Cancel

ACA Applicable Large Employer Report

ABC Distribution and Service Corp. (ABC)

Period End Dates: 01/01/2014 to 12/31/2014

Employee No	Employee Name	Jan Hrs	Feb Hrs	Mar Hrs	Apr Hrs	May Hrs	Jun Hrs	Jul Hrs	Aug Hrs	Sep Hrs	Oct Hrs	Nov Hrs	Dec Hrs
11-0000003	Ferguson,Evan	177	160	0	0	0	0	0	130	40	0	0	0
11-0000100	THOMAS,JERRY A.	128	116	0	0	0	0	0	130	40	0	0	0
11-0000105	JENKINS,ALLEN	121	108	0	0	0	0	0	40	45	0	0	0

ACA Applicable Large Employer Report

ABC Distribution and Service Corp. (ABC)

Period End Dates: 01/01/2014 to 12/31/2014

TOTALS

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Number of Fulltime Employees:	1	1	0	0	0	0	0	2	0	0	0	0
Number of FTE Employees:	2	2	0	0	0	0	0	0	1	0	0	0
Number of Fulltime + FTE Employees:	3	3	0	0	0	0	0	2	1	0	0	0

Average Number of Fulltim

Sage 100 ERP

Do you want to update the Fulltime and Total Employee Count to the ACA Employer file?

Yes No

Employer Maintenance Screen - Monthly Detail



1094-c Report

ACA Employer Maintenance (ABC) 11/7/2014

Year: 2014

Monthly Detail...
Other Members...

Employer
Address: _____
Zip Code: _____
City: _____ State: _____
Country: _____
EIN: 123456789
Contact: Jordan Smith Phone No: _____

Designated Government Entity
Name: govt entity
Address: address 1
Zip Code: 90210
City: Beverly Hills State: CA
Country: USA
EIN: 45-0000354
Contact: Jordy Phone No: 345-6789

ALE Member Part of Aggregated Group

Accept Delete Cancel ?

ALE Member Information - Monthly

Year: 2014

	Month	Min Essential Coverage	Full Time Employee Count	Total Employee Count	Aggregated Group	Transition Relief Indicator
1	Jan	<input checked="" type="checkbox"/>	100	300	<input checked="" type="checkbox"/>	B
2	Feb	<input checked="" type="checkbox"/>	123	4000	<input checked="" type="checkbox"/>	A
3	Mar	<input checked="" type="checkbox"/>	125	4100	<input type="checkbox"/>	
4	Apr	<input type="checkbox"/>	0	0	<input type="checkbox"/>	B
5	May	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
6	Jun	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
7	Jul	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
8	Aug	<input type="checkbox"/>	2	3	<input type="checkbox"/>	
9	Sep	<input type="checkbox"/>	0	3	<input type="checkbox"/>	
10	Oct	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
11	Nov	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
12	Dec	<input type="checkbox"/>	0	0	<input type="checkbox"/>	

Accept Cancel ?

Employer Maintenance Screen – Other Members



1094-c Report

ACA Employer Maintenance (ABC) 11/7/2014

Year: 2014

Buttons: Monthly Detail... Other Members...

Employer Information:

Address: _____
Zip Code: _____
City: _____ State: _____
Country: _____
EIN: 123456789
Contact: Jordan Smith Phone No: _____

Designated Government Entity:

Name: govt entity
Address: address 1
Zip Code: 90210
City: Beverly Hills State: CA
Country: USA
EIN: 45-0000354
Contact: Jordy Phone No: 345-6789

ALE Member Part of Aggregated Group:

Buttons: Accept Delete Cancel

ALE Member Information - Monthly

Year: 2014

Month	Min Essential Coverage	Full Time Employee Count	Total Employee Count	Aggregated Group	Transition Relief Indicator
1 Jan	<input checked="" type="checkbox"/>	100	100	<input checked="" type="checkbox"/>	B
2 Feb	<input checked="" type="checkbox"/>	123	400	<input checked="" type="checkbox"/>	A
3 Mar	<input checked="" type="checkbox"/>	125	4100	<input type="checkbox"/>	
4 Apr	<input type="checkbox"/>	0	0	<input type="checkbox"/>	B
5 May	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
6 Jun	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
7 Jul	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
8 Aug	<input type="checkbox"/>	2	0	<input type="checkbox"/>	
9 Sep	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
10 Oct	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
11 Nov	<input type="checkbox"/>	0	0	<input type="checkbox"/>	
12 Dec	<input type="checkbox"/>	0	0	<input type="checkbox"/>	

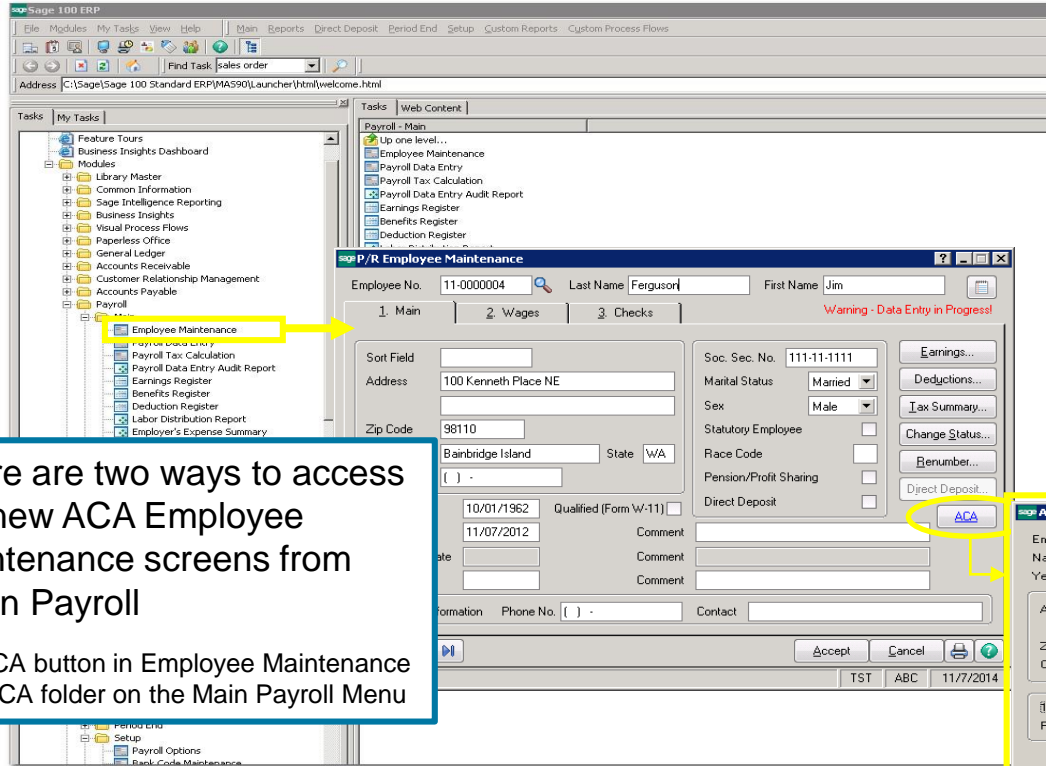
Other ALE Members of Aggregated ALE Group

Year: 2014

	Name	EIN
1	Joe Smith	23-2333333
2	John Doe	43-0005345
3		

Buttons: Accept Cancel

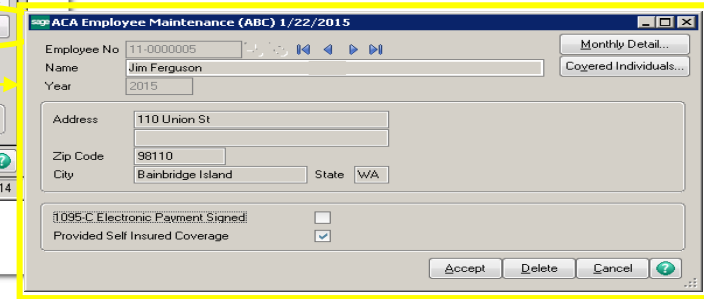
Employee Maintenance for ACA Reporting in Payroll



1095-c Report

There are two ways to access the new ACA Employee Maintenance screens from within Payroll

- ACA button in Employee Maintenance
- ACA folder on the Main Payroll Menu



Payroll → Main → ACA → ACA Employee Maintenance



The screenshot displays the Sage 100 ERP interface. The left-hand navigation pane shows a tree structure with 'Main' expanded to 'ACA Employee Maintenance', which is highlighted with a yellow box and an arrow. The main window shows a list of tasks under 'Payroll - Main', including 'ACA Employee Maintenance'. A pop-up window titled 'ACA Employee Maintenance (ABC) 1/22/2015' is open, showing the following details:

Employee No	11-0000005	Monthly Detail...
Name	Jim Ferguson	Covered Individuals...
Year	2015	
Address	110 Union St	
Zip Code	98110	
City	Bainbridge Island	State WA
1095-C Electronic Payment Signed	<input type="checkbox"/>	
Provided Self Insured Coverage	<input checked="" type="checkbox"/>	

Buttons at the bottom of the form include 'Accept', 'Delete', 'Cancel', and a green checkmark icon.

1095-c Report

ACA Employee Maintenance



sage ACA Employee Maintenance (ABC) 1/22/2015

Employee No 11-0000010 Monthly Detail...

Name Evan Ferguson Covered Individuals...

Year 2015

Address 100 Washington Ave

Zip Code 98101

City Seattle State WA

1095-C Electronic Payment Signed

Provided Self Insured Coverage

Accept Delete Cancel ?

sage ACA Employee Maintenance (ABC) 1/22/2015

Employee No 11-0000005 Monthly Detail...

Name Jim Ferguson Covered Individuals...

Year 2015

Address 110 Union St

Zip Code 98110

City Bainbridge Island State WA

1095-C Electronic Payment Signed

Provided Self Insured Coverage

Accept Delete Cancel ?

The information required in the report depends on whether the employee accepts the offer of insurance coverage from the employer

- Provided Self Insurance Coverage checkbox not selected = employer is not self-insured
- Provided Self Insured Coverage checkbox selected = employer is self-insured

ACA Employee Maintenance – Monthly Detail



1095-c Report

sage ACA Employee Maintenance (ABC) 1/22/2015

Employee No: 11-0000010
Name: Evan Ferguson
Year: 2015

Address: 100 Washington Ave
Zip Code: 98101
City: Seattle State: WA

1095-C Electronic Payment Signed
Provided Self Insured Coverage

Accept Delete

Monthly Detail...
Covered Individuals...

sage Offer of Coverage Monthly Detail

Employee No: 11-0000004
Name: Jim Ferguson
Year: 2014

	Month	Offer of Coverage	Employee Share of Lowest Cost	Applicable Section 4980H Safe Harbor
1	Jan	1A	150.00	2A
2	Feb		.00	
3	Mar		.00	
4	Apr		.00	
5	May		.00	
6	Jun		.00	
7	Jul		.00	
8	Aug		.00	
9	Sep		.00	
10	Oct		.00	
11	Nov		.00	
12	Dec		.00	

Copy to Remaining Rows, All-R

sage Offer of Coverage Monthly Detail

Employee No: 11-0000004
Name: Jim Ferguson
Year: 2014

	Month	Offer of Coverage	Employee Share of Lowest Cost	Applicable Section 4980H Safe Harbor
1	Jan	1A	150.00	2A
2	Feb	1A	150.00	2A
3	Mar	1A	150.00	2A
4	Apr	1A	150.00	2A
5	May	1A	150.00	2A
6	Jun	1A	150.00	2A
7	Jul	1A	150.00	2A
8	Aug	1A	150.00	2A
9	Sep	1A	150.00	2A
10	Oct	1A	150.00	2A
11	Nov	1A	150.00	2A
12	Dec	1A	150.00	2A

Copy to Remaining Rows, All-R

Accept Cancel

ACA Employee Maintenance – Covered Individuals



1095-c Report

sage ACA Employee Maintenance (ABC) 1/22/2015

Employee No 11-0000005

Name Jim Ferguson

Year 2015

Address 110 Union St

Zip Code 98110

City Bainbridge Island State WA

1095-C Electronic Payment Signed

Provided Self Insured Coverage

Monthly Detail...
Covered Individuals...

Accept Delete

sage Covered Individuals

Employee No 11-0000004

Name Jim Ferguson

Year 2014

	Covered Individual Name	Date of Birth	Social Security No	Covered All Months	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	Jim Ferguson	10/1/1960	11-111-1111	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Roxanna Ferguson	7/1/1968	22-222-2222	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3				<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"/>

Accept Cancel

Jim added Roxanna to his insurance when they got married in this past April.

Timing of Release for ACA Enhancements



- New Enhancements in Sage 100 ERP Payroll
 - Will be released in a Product Update *after* the Government finalizes the forms*
 - Crystal Report for Large Employer Determination
 - ACA Employer Maintenance
 - ACA Employee Maintenance
- To help large customers get started -→ Sage 100 ERP ACA Spreadsheet
 - Will be posted on the ACA Center in Sage City on January 30, 2015
 - Will support direct import of information into new ACA enhancements in Sage 100 ERP

*The Government still has not finalized the forms as of January 15, 2015

Let's get started! New spreadsheet for ACA Reporting

Get a head start on entering employee info needed for 2016 reports



A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
Spreadsheet Record Definitions:																						
	Record for 1095-1 info	Record No Indicator = 1095-I	Year	Employee No	Provided Self Coverage (Y/N)																	
	Record for 1095-11 info for monthly detail	Record No Indicator = 1095-II	Year	Employee No	Month (1-12)	Offer of Coverage (1A - 1I)	Employee Share of Lowest Cost	Applicable Section 4980H Safe Harbor (2A - 2F)														
	Record for 1095-111 info for covered individuals	Record No Indicator = 1095-III	Year	Employee No	Entry No	Covered Individual	SSN	Date of Birth	Covered Jan (Y/N)	Covered Feb (Y/N)	Covered Mar (Y/N)	Covered Apr (Y/N)	Covered May (Y/N)	Covered Jun (Y/N)	Covered Jul (Y/N)	Covered Aug (Y/N)	Covered Sep (Y/N)	Covered Oct (Y/N)	Covered Nov (Y/N)	Covered Dec (Y/N)		
****This is the sample spreadsheet below. DO NOT delete or move any of the existing columns. You can add columns to the end if needed, but they will be ignored by Sage's import. ****																						
Sample Spreadsheet:																						
	Record for 1095-1 info	1095-I	2015	11-0000001		N																
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	1	1A	\$	60.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	2	1A	\$	60.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	3	1A	\$	60.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	4	1A	\$	60.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	5	1A	\$	60.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	6	1A	\$	60.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	7	1B	\$	150.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	8	1B	\$	150.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	9	1B	\$	150.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	10	1B	\$	150.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	11	1B	\$	150.00	20													
	Record for 1095-11 info for monthly detail	1095-II	2015	11-0000001	12	1B	\$	150.00	20													
	Record for 1095-111 info for covered individuals	1095-III	2015	11-0000001	1	Jim Smith		123-45-6789														
	Record for 1095-111 info for covered individuals	1095-III	2015	11-0000001	2	Jordan Smith		123-45-6789														
	Record for 1095-1 info	1095-I	2015	11-0000002		N																

Use this spreadsheet until the IRS finalizes the forms.

Once the IRS finalizes the forms, we will release the Payroll enhancements and you will be able to directly import this information into Sage 100 ERP Payroll using VI.

The spreadsheet will be available for download in the ACA Center on Sage City on January 30, 2015.



ACA information from Sage

On-demand training: Learn from our experts as they explain what you need to know about the ACA and healthcare decision making. To access, scroll to the "On-demand training: ACA and healthcare decision making" section of this page.

The Healthcare Reform Survival Guide: Checklists and explanations to help you meet changing health benefits compliance mandates

How to Determine if you should pay or play: Use the flow chart from our Survival Guide to help decide which options are right for your company

The Affordable Care Act—are you ready: Check out this infographic for quick stats about ACA.

New year, new concerns: 10 ACA issues to track: As implementation of the Affordable Care Act (ACA) unfolds, brokers/employers need to keep an eye on several important issues

Patient Protection and Affordable Care Act The Acronym List: Handy list of ACA related acronyms and what they stand for.

Inspire Tour 2015: join us live at a location near you where sessions like "Affordable Care Act: How Sage is Helping with Requirements" may be presented.

Start or join a conversation in one of the Sage City Business Communities.

Other ways Sage can help with ACA

- Learn more about [My Workforce Analyzer](#) from Sage HRMS, which helps identify large employers, determine coverage affordability, and monitor employee eligibility.
- Learn about the [Health Benefits Explained Library](#) from Sage HRMS which consists of live and on-demand benefits-focused training for employees and PPACA impact-focused training for employers.
- Check out the latest information from Sage HRMS from [SageCanHelp.com](#)

ACA help from your Sage Solution

Note: Some assets require an active Sage Business Care Plan.

Sage 50 U.S.

- [How do I track and report health insurance information for the Patient Protection and Affordable Care Act](#)
- [How do I enter beginning balance hours for salaried employees](#)
- [How do I view hours worked by employees](#)
- [How do I report employer paid health insurance on the W-2](#)
- [Year-End Center](#)
- [Support Community](#)

Sage 100 Contractor

- [What do I need to know about the Affordable Care Act \(ACA\)](#)
- [Will Sage 100 Contractor support the Affordable Care Act \(ACA\) reporting requirements for 2015](#)
- [Year-End Center](#)
- [Support Community](#)

Sage 100 ERP

- [Webcast: Sage 100 ERP Payroll Enhancements for ACA reporting requirements](#)
- [Will Sage 100 ERP support the Affordable Care Act](#)
- [How to report Employer-Sponsored Health Care coverage on the W2 form](#)
- [Year-End Center](#)
- [Support Community](#)

All updates related to ACA reporting requirements and the ACA Spreadsheet for Sage 100 ERP Payroll customers will be available under the Sage 100 ERP section here in the ACA Center