

Client Training HQ

Health e(fx) Selective Printing

Overview

Due to the passage of the Paperwork Burden Reduction Act, employers are no longer required to distribute Forms 1095 to employees provided they adhere to the Alternative Method of Furnishment requirements. To provide flexible form distribution options to application users, the Selective Printing feature can be used. Users have the ability to choose to print all, a subset, or none of the Forms 1095 in Health e(fx). This document walks through the process of selective print options.

Selective Printing Process

Prior to accessing Health e(fx), users should have notified their PSM or Health e(fx) support to indicate their print selections.

Selecting Forms to Print

Begin by accessing Health e(fx).

1. Navigate to **Submissions**.
2. In Submission Approval, you will now see Furnishment as the approval type. Select the **Batch details**.
3. Then, select which forms to print. **Print Subset of Forms** will be the default selection when 'Selective Printing' is the option selected under configuration. Please contact a support representative if you need to make any changes to this selection.
4. Select the subset of forms. You can see how many forms are available for each subset in the parentheses (). These options include states with mandated state reporting that you are contracted for, inactive employees, or the ability to load your own list of employees to submit forms to.

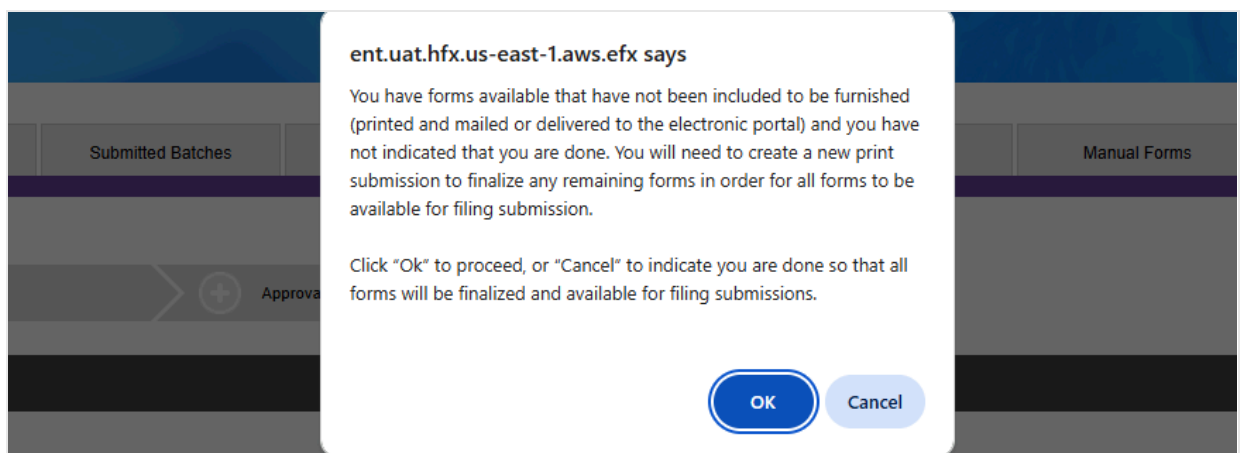
Note: This example utilizes Print State Mandated Forms. See below for additional information regarding the selection of **My List**.

5. Select whether you are done managing forms for the year.
 - a. **I am done:** If you will not be submitting any additional forms for distribution to employees, select **I am done managing forms for the reporting year**. This will finalize the forms included in the print submission and *all other forms* to be ready for filing. Any further form changes and print submissions will need to be managed under 'Pending Batches'.

- b. **I am not done:** If you are going to submit additional print batches at a later time, select **I am not done managing forms for the reporting year**. This will finalize only the forms included in this submission, and additional fulfillment batches can be created from the Submissions tab when you are ready. You must submit all forms in a submission to finalize them for filing as always required in the past.
6. Select which FEINs to review.

Note: If you do not wish to review forms, select the **Do not review any forms** checkbox, if enabled. See below for additional information.
7. Select **Begin New Approval**.

8. Once **Begin New Approval** is selected, a window will appear with additional information. Select **OK** to continue.



If My List is selected to print, you can utilize the My List template to upload a list of employees from your local drive who you want to submit in the batch.

Once the file is uploaded, a window will appear indicating which rows were approved or if any rows contain errors. If errors appear, in order to include the file on the approval you will need to reject the file, resolve the errors, and upload the file again before proceeding.

☒ **My List (0)**
Print a 1095 form for an uploaded list of form recipients.

File Name	# of Forms	Uploaded By	Uploaded Date	Action
ExampleCompany_20XX_MyList_9145 EES.xlsx	9140	User One	12/8/20XX 2:25:48 PM	☒ Include ☐ Delete
SampleOrg_20XX_MyList_27K EES.xlsx	534	User One	12/8/20XX 2:28:12 PM	☐ Include ☐ Delete

UPLOAD MY LIST

DOWNLOAD MY LIST TEMPLATE

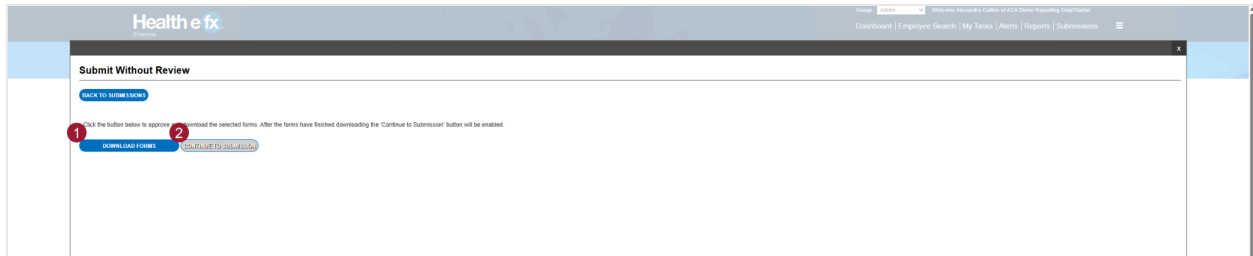
The audit process is largely unchanged. At the top of the page, you will see the **Print Reason** with an explanation of why that form is in the audit.

[BEGIN NEW APPROVAL](#)

			Title	Result	Date Created	Created By
CONTINUE	DELETE	 Example Print Batch		True	12/10/20XX 11:53:29 AM	User One

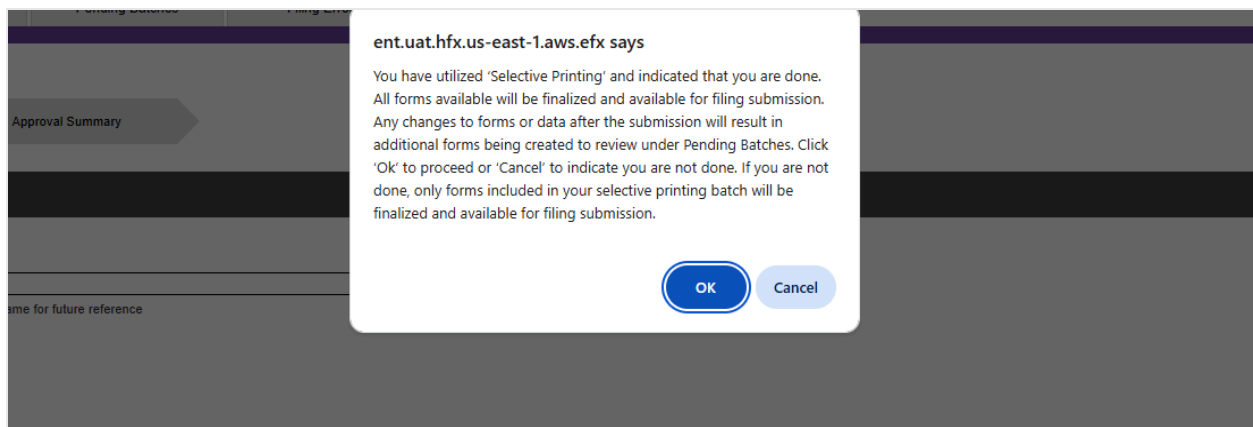
Submit without Review

If **Do not review any forms** is selected, the audit process will be different. Once **Begin New Approval** is selected, the **Submit Without Review** window will appear. First, you must select (1) **Download Forms** before you select (2) **Continue to Submission**. You will then be prompted to complete the approval.



Submission

When you are ready to complete the final approval and proceed to submit to the IRS, select **I am done managing forms for the reporting year** and proceed with the final approval. A pop-up will appear to confirm the action.



View Submitted Batches

Once an approval has been submitted, it can be viewed in the **Submitted Batches** tab of the Submissions page. Print approvals will appear in a table under the **Print Submissions** heading. Select the **download icon** to download a copy of the print approvals.

Submissions

Submission Approval

Pre-Print Alerts

Submitted Batches

Pending Batches

Filing Errors

Batch Hold

Manual Forms

Tax Year Filter: 20XX

Print Submissions:



	Number of records in Batch	Submitted By	Submitted On	Sent To Print	Number of Forms Delivered Electronically	Number of Forms Sent to Printer	Snapshot Time Range	Batch Type	Batch Status
	1091	User One	12/16/20XX 12:12:45 PM		0	None	07/06/20XX - 12/16/20XX	Federal 1095-C (Selective Print)	Client completed audit

IRS Submissions:

No data found.

State Submissions:

Select State: All States

No data found.

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.