EQUIFAX

Client Training HQ

ACA Worxtime Reporting Season Action Items (Oct-Dec)

ACA Product Support recommends that administrators and/or users of Worxtime routinely monitor their instance for data currency and quality and eligibility review. This Q4 checklist will assist with proper tracking and ensure that you experience a more positive 1094-C and 1095-C reporting season. Here is a checklist for items to be completed in Worxtime this quarter.

	Event	Action
☐	**Previous Tax Year IRS Filing**	All of the previous tax year's IRS Filings with responses of **Accepted with Errors** or **Rejected** should have been reviewed and/or corrected and refiled to the IRS as necessary. You can ensure this has been done by expanding the "Previous Tax Year" Reporting Year information located at the top right side of the Dashboard in the Worxtime application. If you have any submissions that are **Accepted with Errors** or **Rejected**: 1. Update information for affected employees by navigating to ***IRS Reporting > IRS Submissions > Manage Corrections > Resolve***, to resolve any IRS Errors that you are able to. Once you have updated all records: 2. Submit corrected forms to the IRS by navigating to ***IRS Reporting > IRS Submissions > Resubmit Corrections***. This will queue the updated records for refiling with the IRS. A notification will be sent to the main point of contact indicated in the Worxtime application once a new IRS response has been received.
☐	**Current Tax Year Rule Sets (before the start of Q4)**	For the current tax year, provide updated monthly employee contribution amounts for the lowest cost plans offered to your employees to your designated Worxtime Support Analyst. You can ensure the amounts have been entered into the Worxtime application by clicking on ***My Company > 1094/1095 Reporting***. Ensure "Current Tax Year" Rule Sets are present and that the rates are accurate.

	Event	Action
☐	**Employee Demographic Data**	**Employee Demographic** files should be uploaded regularly throughout the reporting year. To help ensure there are no pending discrepancies that need to be resolved, navigate to the **Company To Do List** located on the right side of the dashboard in Worxtime.
☐	**Timesheet Data** **does not apply to Reporting Only customers*	**Timesheet** files should be uploaded on an ongoing basis throughout the reporting year. To help ensure there are no missing timesheets, navigate to the **Company To Do List** located on the right side of the dashboard in Worxtime.
☐	**Coverage Data**	To help ensure you are taking advantage of the compliance tools in the Worxtime application, **Coverage** files should be uploaded on an ongoing basis, at least monthly, throughout the reporting year. If you upload Coverage files annually, the earlier you load your files, the sooner you can receive more accurate reports with employees who may be missing an offer of coverage. If you depend on a third party such as an insurance carrier or benefits administration company to generate your coverage files, be sure to request your files early. Loading offers of coverage early and often is critical.
☐	**Discrepancies and Company To Do List**	The **Company To Do List,** located on the right side of the dashboard in Worxtime, will indicate if there are any pending Employee Demographic or Timesheet discrepancies that need to be resolved. Be sure to resolve any action needed to clear your **Company To Do List** before the reporting season. To check for Coverage file discrepancies, navigate to the Coverage History page under ***Compliance > Upload Coverage***. You cannot certify your Audit Wizard, mail 1095-C forms, or e-file to the IRS using our system unless all discrepancies are resolved.
☐	**EBNOC (Eligible but not Offered Coverage) Report**	Once your Coverage file(s) have been loaded, you can begin reviewing your **EBNOC Report(s)** found under ***Reports & Alerts > Reports > IRS > Employees Eligible But Not Offered Coverage***. Any employees listed on this report would indicate a potential risk and penalty to the IRS.

	Event	Action
☐	**Audit Wizard**	Once the above steps have been completed, begin your **Audit Wizard**. This process allows you to review data and certify your 1095-C and 1094-C forms. Access the Audit Wizard under ***Audit Wizard > "Current Tax Year" Wizard > Let's Get Started.***

Need Additional Support?

Should you have any questions regarding completion of any or all of these action items, please do not hesitate to contact ACA Product Support, Monday - Friday, 7 a.m. to 5 p.m. CST by phone at 1.800.374.9507 or email at clientservices@worxtime.com.

Need Additional Training Resources?

Check out our free live and on demand ACA resources at our site Connections.

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