Client Training HQ

Worxtime Audit Wizard

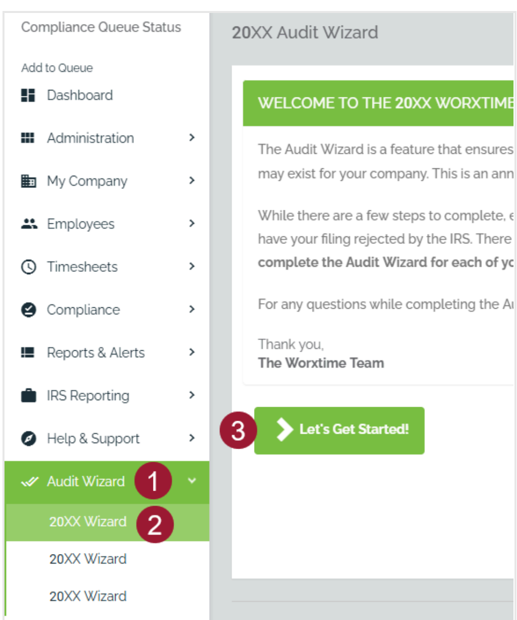
About the Worxtime Audit Wizard

The Audit Wizard is an annual review/certification process that helps ensure your company settings and 1094/5-C Forms are accurate. You must complete this process for each company/FEIN before forms for that company will be finalized and ready for reporting. Instructions for each of the 18 required steps are also included within the application, and this guide is provided to help answer any questions that might arise while completing your Audit Wizard(s).

The Audit Wizard should not be completed until all required data has been uploaded and errors/discrepancies have been resolved.

Getting Started

1. To access the Audit Wizard, select **Audit Wizard** from the left navigation menu within Worxtime.
2. Then, click the relevant year's wizard.
3. Finally, click **Let's Get Started**.



Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Navigating the Audit Wizard

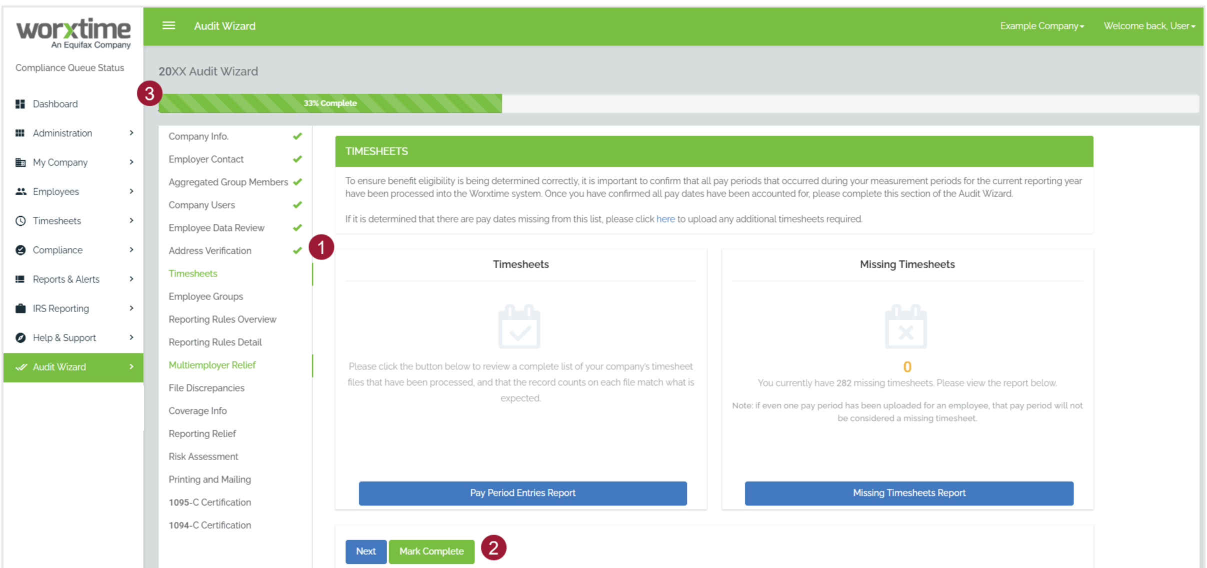
To complete this process, work your way through each tab.

1. As you do so, you will see a green checkmark appear, indicating that the step has been completed.

   Note: An explanation of each tab is listed in subsequent pages.

2. After reviewing the information and confirming accuracy, click the **Mark Complete** button to complete the step.

3. Your overall progress percentage will be displayed at the top of the screen.



Any progress made within the Audit Wizard will be automatically saved so that you can log out of Worxtime and return where you left off.

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Audit Wizards Steps

Company Info:
This section includes information that will appear in Part 1 of your employee 1095-C Forms and Part I of the 1094-C Form filed with the IRS. It is imperative that this information is accurate. You can make changes here as needed and the information will also be updated under “Company Configuration.”

Employer Contact:
This section includes the contact information that will appear on Part I of the 1094-C Forms filed with the IRS. The phone number provided here will also appear on your employee’s 1095-C Form. This will be used if they have questions regarding their form. You can make changes here as needed and the information will also be updated under “Company Configuration.”

Aggregated Group Members:
If you have multiple companies/FEINs as part of an aggregated controlled group, each of those companies will be listed here, and seen on part IV of the 1094-C Form. Review the information and ensure that all FEINs that are part of your controlled group are listed. Contact your support analyst if any information is missing or inaccurate. If you are not part of a controlled group and do not have additional companies to report, simply click the **Mark Complete** button to move forward.

Company Users:
This step lists all users that have been set up in the Worxtime application under the company. While this step is not directly related to annual reporting, it is an opportunity to review and deactivate any users that are no longer active or should not have access to Worxtime.

Employee Data Review:
This section provides lists of employees who are flagged for a potential issue with their address or SSN. If any flags are present, please click the link to review and/or resolve. If no flags are present, click **Mark Complete** to move forward.

Address Verification:
This section provides a sample of 10 random employees, as well as their SSN and address data. It is recommended that you verify these 10 records to ensure data was loaded into Worxtime as intended. Please note that each time you access the Audit Wizard you will receive a new random sampling here. While verifying, we suggest you do not leave or refresh this page until complete.

Timesheets:
This section allows you to confirm that all pay dates for your measurement periods have been accounted for. If you are a Reporting Only Worxtime client, please click **Mark Complete** on this step as it does not pertain to you.

Employee Groups:
This section is for Tracking and Reporting customers who are educational institutions. If this applies to your company, please ensure the employee groups are set up correctly for the reporting year. Otherwise, click **Mark Complete** to continue.

Reporting Rules Overview:
This section displays the Measurement Groups existing for your company. Please review and ensure the status shows “Ready for Reporting” for any groups with employees assigned. If no issues are present, click **Mark Complete** to move forward.

Reporting Rules Detail:
Click the plus button (+) next to each measurement group in this section to confirm that the monthly offer codes, safe harbor codes, employee costs, and COBRA costs are accurate for the reporting year. If changes are required, click the link available to visit the “Reporting Rule Setup” page to edit the information. If no issues are present, click **Mark Complete** to move forward.

Multiemployer Relief:
If you have Union employees that fall under the Multiemployer Interim Rule Relief guidelines, you will see them listed below. Otherwise, you will see “Not Using Multiemployer Relief”. If this is correct, click **Mark Complete** to move forward. Otherwise, contact your support analyst to determine what steps are needed to correct the issue.

File Discrepancies:
If you have discrepancies (issues with records that are preventing the records to load) present for any of your uploaded files, they will be shown here. You will not be able to complete the Audit Wizard until each file shows “0” discrepancies. If you need assistance resolving discrepancies, please contact your support analyst.

Coverage Info:
This section helps to ensure all “offers of coverage” have been recorded in Worxtime. It is important to carefully review all messages displayed in this section. If any of your plans are self insured, you should have included enrolled dependents on your coverage file(s). If any dependent SSNs need to be reviewed, they will be identified here. You should have 12 months with coverage (unless your company was not active for the entire year). Any employees on the “Eligible But Not Offered Coverage” report could indicate possible missing offers of coverage or incorrect data that could result in penalties from the IRS. Please review any employees on this report and reach out to your support analyst with any questions.

Reporting Relief:
This section pertains to line 22 of Form 1094-C. This step will provide information on whether or not your company is eligible to claim either reporting relief A or D (B and C are reserved). Since it is not required to check these boxes, even when you qualify for one or both, you must indicate through this step if you want to have the boxes checked when filing to the IRS. Please consult legal counsel for assistance in determining which you claim, if any. You will only be eligible to claim box A if you offer a plan that utilizes the 1A qualifying offer method and premiums fall below the FPL amount for even one employee. Box D, the 98% offer method, will be available if you have offered benefits to at least 98% of your eligible employees.

Assessment:
This section helps you to understand your potential penalty risk from the IRS. If you have offered coverage to all employees and are still showing penalty risk, please refresh the page first. If a potential penalty risk still appears and you believe this is not accurate, please reach out to your support analyst.

Printing and Mailing:
This section will indicate if you have chosen to print and mail Forms 1095-C on your own (self-service) or if you have contracted with Equifax® to do so on your behalf (fulfillment service). Please make sure the correct indication is showing before checking the box next to your name and clicking **Mark Complete**. If you are not currently contracted for fulfillment service, you can request a quote within the step and submit a request for a contract amendment. A representative will reach out to you within three business days to complete the amendment process.

1095-C Certification:
Before you can complete this section, you must click the button to "Preview Your Forms." Once you click this, an additional tab will open in your browser showing the draft version of your Forms 1095-C. Once you have reviewed your forms for accuracy, return to the Audit Wizard and check the box next to your name, and then, click **Certify Audit Wizard**. A "Final Confirmation of 20XX Audit Certification" will appear. Please type in your first name as it appears in the top right corner of your screen. Do not include any additional spaces or characters. Once the Certify Audit Wizard button turns solid green, click **Certify Audit Wizard**.

1094-C Certification:
When ready to certify your 1094-C Form, check the box next to your name and then click **Certify Audit Wizard**. Then a "Final Confirmation of 20XX Audit Certification" will appear. Please type in your first name as it appears in the top right corner of your screen. Do not include any additional spaces or characters. Once the "Certify Audit Wizard" button turns solid green, click **Certify Audit Wizard**.

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.