worxtime
An Equifax Company

user guide

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What is Worxtime?

Purpose/Summary:
Learn what the Worxtime system was designed to do and how you can make the most of your investment.

Details:

Worxtime is an Affordable Care Act (ACA) web-based application for employers. This software-as-a-service helps track employee eligibility by utilizing the "Look Back Method." Worxtime helps manage employee eligibility through the employer's chosen Measurement, Administrative, and Stability periods. This helps ensure alignment with the Affordable Care Act and provides valuable reporting data. Worxtime helps inform employers of employee eligibility for an ACA-mandated offer of health insurance. Forecasting data helps your company's financial officers to budget based on the probability of employees who will potentially achieve full-time status. This helps enable employers to budget effectively and help minimize potential ACA compliance risks. In addition, Worxtime auto-populates IRS forms 1094-C and 1095-C per Section 6055/6056 reporting requirements.

For more information, visit our website.

How do I maintain my Worxtime system?

Purpose/Summary:
Learn what to do during an employee's Administrative and Stability Period as well as at the end of the tax year.

Details:

Employee Demographic Information
You should upload your updated employee demographic information into your Worxtime database each pay period or, at a minimum, each month. Updating your employee demographic information includes adding new hires, rehires, and/or inputting termination dates for employees who have been terminated since your last upload. Employee demographic updates should also include employee name or address changes. This information will be used to populate your employee 1095-C forms, so it is important that all employee demographic information is current.

Credit Hours Paid to Your Employees
In order for Worxtime to help determine health insurance eligibility, employers utilizing Worxtime Tracking & Reporting should credit hours paid to their employees. It is important to keep this data current, in order to maintain accurate and current eligibility trending reports for your employees. Worxtime helps track eligibility for all employees (full-time and variable hour). Employers using Worxtime Tracking & Reporting can find their trending eligibility reports on their dashboard under the Reports tab.

During an Employee's Administrative Period
The Standard Administrative Period, which follows each Standard Measurement Period, normally occurs during your annual enrollment period for your benefit plan year. During the Administrative Period, employers should conduct all of the necessary administrative work required to offer qualifying coverage to eligible individuals. New hires are an exception; they enter an Initial Measurement Period and are measured independently based upon their hire date to help determine eligibility for an Initial Administrative Period. This means that newly hired employees can become benefit eligible outside of your Standard Administrative Period, so watching the dashboard is important! These employees should join the remainder of your organization against those data parameters.

> ***Note:*** Administrative Period means action! Employees enter an Administrative Period when they qualify for an ACA-mandated offer of insurance coverage. You should ensure that everyone who is benefit eligible and offered coverage, whether coverage was elected or waived, is entered into the Worxtime database via the Coverage Upload tab.

During an Employee's Stability Period
When Worxtime displays an employee in a Stability Period, the employee's Administrative Period has ended and you should have already offered them health insurance. During the employee's Stability Period, health coverage eligibility cannot be rescinded regardless of how many hours they work, unless the employee is terminated, retires, or meets the IRS Rescission of Coverage requirements.

End of the Tax Year
Worxtime highly encourages clients to upload coverage files throughout the year to capture start and stop dates. If you have not uploaded your coverage file throughout the year and you offered coverage to your employees, you will need to upload a coverage file before certifying your 1095-C forms for mailing. Otherwise, your forms may not accurately reflect employee information.

An employee's coverage file is your record that an offer of benefits was made by showing that the employee enrolled in coverage or waived the offer. In January, you should review your employee's 1095-C forms to ensure accuracy. Afterward, you can complete the Audit Wizard. Certifying the Audit Wizard will give Worxtime approval to print your forms (if you have opted into Worxtime Fulfillment) and e-file them to the IRS. If you did not elect Worxtime Fulfillment, completing the Audit Wizard will allow you to access the electronic PDF of your employees' 1095-C forms for your distribution.

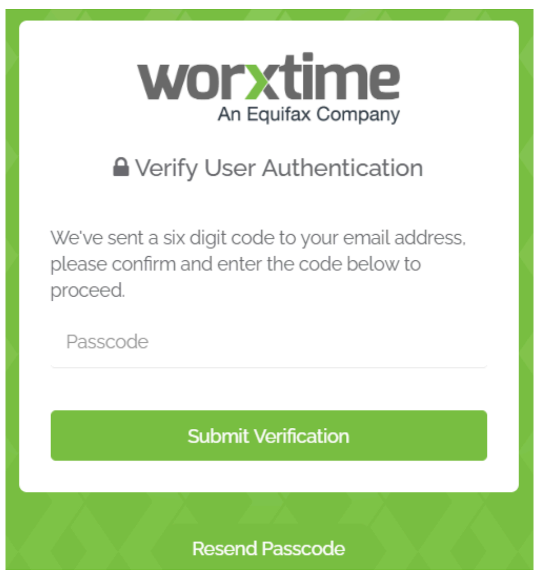
How do I access Worxtime?

Purpose/Summary:
Learn how to access the Worxtime app and what to do if you need to reset your password.

Details:

Your assigned Worxtime Account Manager will create new user accounts after the initial Implementation call. Once your user account has been created, you will be sent an email from notifications@worxtime.com containing a link that will allow you to create a password. After your password has been created, you will have access to the Worxtime system.

The Worxtime Tracking and Reporting System can be accessed at app.worxtime.com. You will need to enter your username and the password you have created. Upon signing in, you will be emailed a six digit code that you will then need to enter into the space provided in order to verify user authentication. Once you have entered the six digit code, you will click "Submit Verification" to gain access to the system.



If you have forgotten your password, click "Forgot Your Password?" under the "Sign In" button on the login screen. Enter your username on the Reset Password screen that appears, and then click "Submit."

You will receive an email from notifications@worxtime.com containing instructions to finish resetting your password.

If you or another user needs access to the system, please contact your assigned Worxtime Account Manager or email client services at clientservices@worxtime.com.

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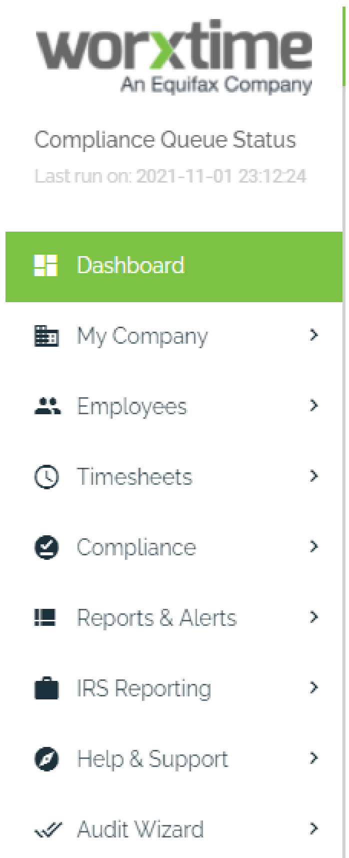
How do I navigate Worxtime?

Purpose/Summary:
Learn how to use the navigation menu.

Details:



After you have logged in to Worxtime, you will notice that the left side of the screen houses the main navigation menu. These links will allow you to navigate to various parts of the system.

The drop-down menu to the right displays the name of the company you are currently viewing in Worxtime. If your company is part of an organization and you have access to view the other companies in the organization, you will be able to click this drop-down menu and select other companies.

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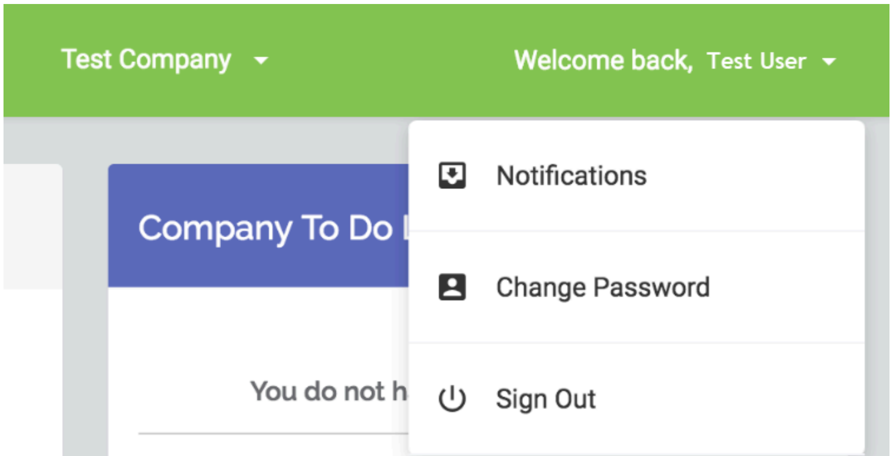

The second drop-down menu welcomes you with your first name as it is listed in the system. Clicking on this drop-down will allow you to view notifications, sign out, or change your password.

How do I use the Worxtime Dashboard?

Purpose/Summary:
Learn what the dashboard displays and how to use this information to help maintain compliance.

Details:

The primary purpose of the dashboard is to help provide current eligibility information for your employee population. This allows you to view those who are benefit eligible as well as those who are trending eligible based upon their hour calculations within the current measurement period.

It is of the utmost importance to make sure that your Employee Demographic records and Timesheets provide the most up-to-date information possible. Falling behind on your uploads will lead to inaccurate depictions of your workforce demographic on the dashboard.

Please make sure your compliance information has been calculated and your file uploads are up-to-date before relying on your dashboard for eligibility information.

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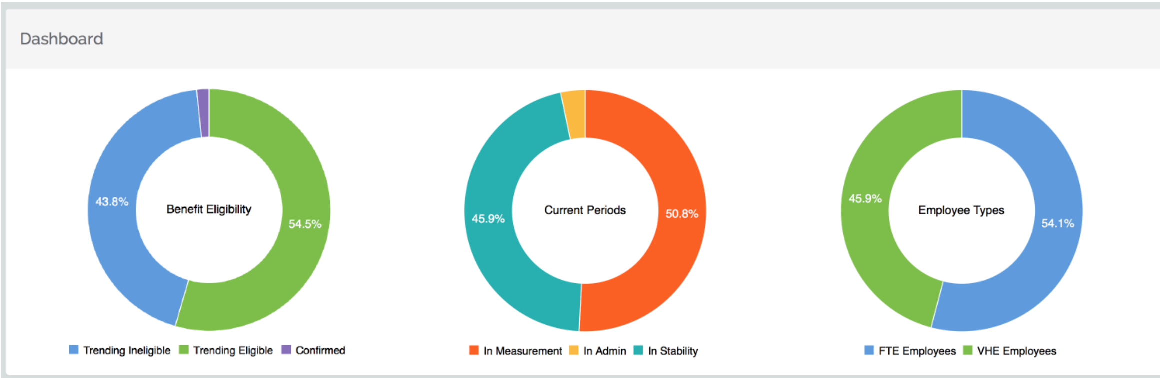
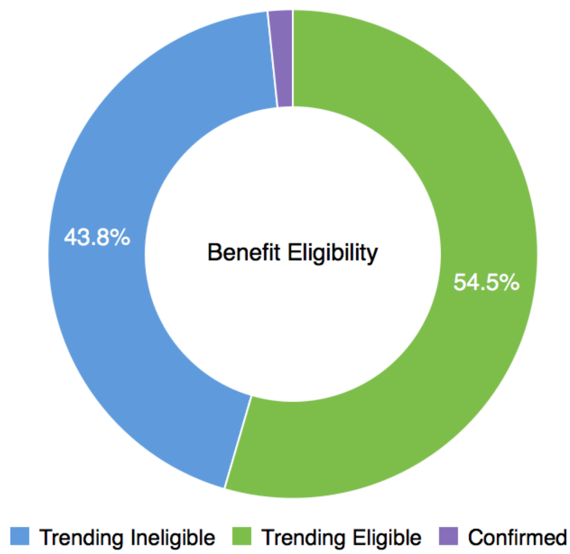
The Interactive Dashboard



The interactive circle graphs give you an at-a-glance overview of your company in nearly real time. To view more information about each section, simply click on the colored portions of the circle to view a report of all employees who qualify for the selected criteria.

Benefit Eligibility Graph



For instance, if you click on the green portion of the Benefit Eligibility graph, the Worxtime system will instantly run a report of all current employees who are trending benefit eligible. You will be redirected to the report page, which will include a full list of all trending eligible employees and their demographic information.

Employees Trending Ineligible includes employees who are currently averaging less than 30 hours per week. If these employees continue to work the number of hours they are currently averaging, they will not be eligible for an ACA-mandated offer of healthcare insurance.

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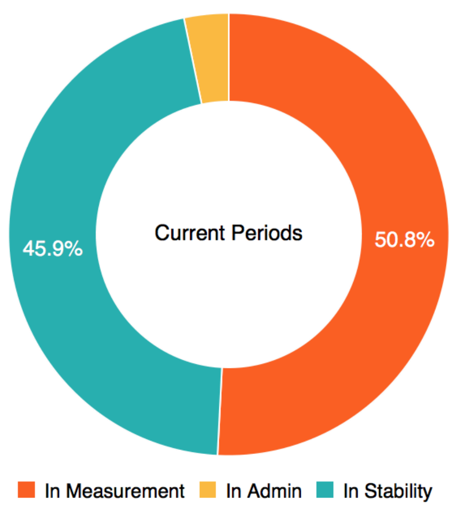
As employees begin averaging 30 or more hours per week, they will move from Employees Trending Ineligible to Employees Trending Eligible. You will notice this transition most in the first few months of your Standard Measurement Period.

Employees Trending Eligible includes all employees who are currently averaging 30 or more hours per week. If these employees continue to average 30 or more hours per week, they will be eligible for an ACA-mandated offer of healthcare insurance.

Employees who meet their minimum hours required threshold before the end of the current Measurement Period are indicated in the purple region of the circle graph.

Employees Confirmed Eligible includes employees who have not completed their measurement period, but have worked enough hours to meet the full-time threshold requirement for the year. These employees have already qualified for an ACA-mandated offer of health insurance and must be offered insurance during their Administrative Period.

Current Periods Graph



All employees listed in the orange Employees in Measurement Period region are currently being measured for eligibility.

When an employee, usually Trending or Confirmed Eligible, completes their current measurement period, they will move to the yellow Employees in Admin Period region.

All employees listed in the yellow Employees in Admin Period region were deemed eligible for an ACA-mandated offer of health insurance during their last completed measurement period. These are the employees you should make qualifying offers of health insurance coverage to. Per ACA regulation, you have 91 days to make an offer of qualifying health coverage to each of these

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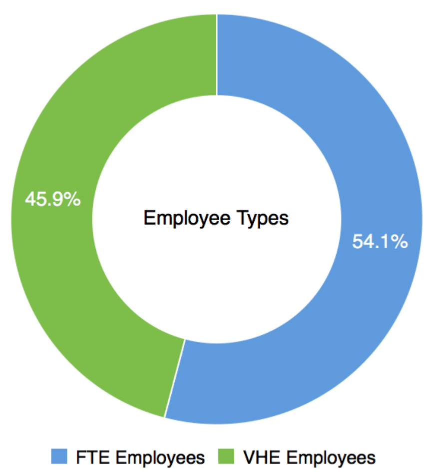
employees, although you may have chosen a different Standard Administrative Period length when onboarding with Worxtime.

After employees complete their Administrative Period, they will be moved from the yellow Employees in Admin Period region to the orange Employees in Stability Period region.

All employees listed in the orange Employees in Stability Period region are in a Stability Period. These employees have had an eligibility status locked in until the end of the Stability Period. This Stability Period normally runs alongside your benefit plan year.

Employees must qualify for an ACA-mandated offer of coverage to enter a Stability Period, so all of the employees listed in the orange region should have qualified for an ACA-mandated offer of coverage in the last completed Measurement Period. You should have offered each of these employees qualifying health insurance during their Administrative Period.

Employee Types Graph



The two circles on the bottom row of the dashboard indicate the number of active full-time and variable hour employees. These calculations are based on the Employee Type assignments given to your employees on the Employee Demographic file. Inaccurate depictions in the Employee Type field will thus lead to inaccurate counts in the Full-time and Variable Hour circle on the dashboard. Only active employees are included in the Employee Types circle graph. Employees who have been terminated or retired will not be accounted for.

Full-time Employees will appear in the blue region.

Variable Hour Employees will appear in the green region.

What is the IRS reporting information module?

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

Purpose/Summary:
Learn how to use the IRS Reporting Information module of the Dashboard.

Details:

The Submission Status of your 1094/1095-C e-file submission to the IRS will be housed in the IRS Reporting Information module of your dashboard.

To view a full overview of your submission information, click the "+" beside the reporting year you wish to review. After you click the "+", the module will expand to reveal information about your Audit Wizard Certification and e-file information.

Your IRS submission may be returned with three possible outcomes: Accepted, Accepted with Errors, or Rejected. Submissions that are Accepted have been reviewed by the IRS and found to contain no errors. Submissions that are Accepted with Errors have been reviewed by the IRS, but some errors need to be examined and some forms may need to be resubmitted. Submissions that were Rejected have errors that prevented them from being reviewed by the IRS. This is usually a company name or Tax ID error.

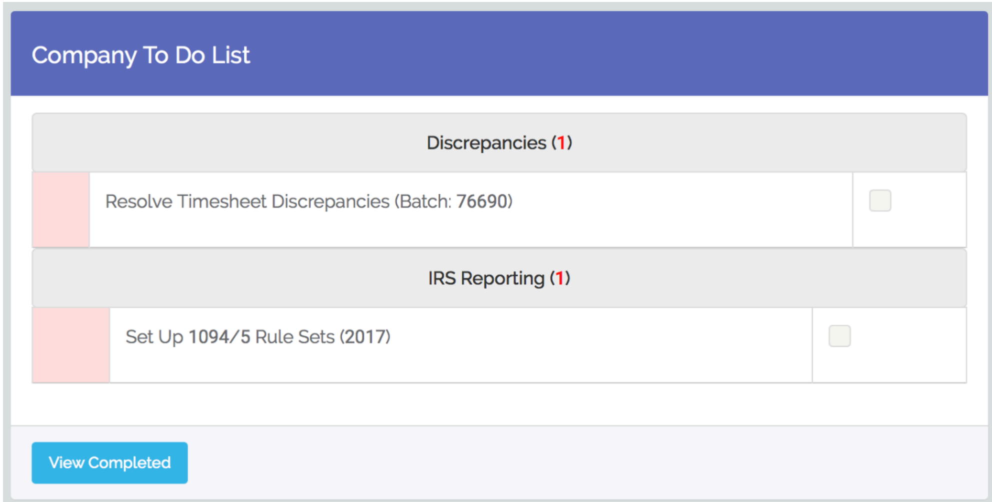
Any errors identified by the IRS will need to be addressed and resolved by the employer. This will allow Worxtime to resubmit the data for additional IRS review.

How do I use the Company To Do List?

Purpose/Summary:
Learn how the Company To Do List can help you keep your data up to date.

Details:

Company To Do List



Your Company To Do List provides an interactive checklist of outstanding tasks you need to complete. This feature is designed to track your progress of various necessary steps in Worxtime. Each of these Tasks will be automatically generated by the system when you have outstanding requirements to complete. Some tasks are optional and can be manually checked off by the user.

Task Types

There are four types of tasks that can appear in the Company To Do List module: Initial Company Setup, Discrepancies, IRS Reporting, and Pay Periods.

- Initial Company Setup – These tasks are generated when a new company is created in Worxtime. They are meant to help guide the user through the company setup process and verify that all of their company information is correct.
- Discrepancies – These tasks are generated automatically whenever there are Employee or Timesheet discrepancies present in the system. Upon resolving the discrepancies, the tasks are automatically cleared and removed, so the user will not need to check anything as completed after resolving.
- IRS Reporting – These tasks are generated when the company has a valid contract with Worxtime for a given year, but has not yet set up their IRS Reporting Rule Sets for that year. Configuration for these rule sets are found under the 1094/1095 Reporting link in the My Company.
- Pay Periods – These tasks are generated in relation to a particular pay period. They will be triggered when a company has missing timesheets.

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Tasks

The Worxtime system can generate up to thirteen tasks. Some of these are required, meaning that the check-box will be disabled if the corresponding data is missing. The task will remain in the Company To Do List module until the requirements are met.

- Initial Company Setup
  - Upload Employee Demographic – This task will be disabled if there are no employees for the company in the system. The task must be manually checked once employees have been added.
  - Set Up Company Pay Periods – Adding a pay period is required for completing this task. The task must be manually checked as complete once measurement periods are added.
  - Set Up Measurement Periods – Adding a measurement group is required for completing this task. The task must be manually checked as complete once measurement periods are added.
  - Review/Update Company Info – Not Required. This task can be checked as complete at any time, but it is recommended that users visit the Company Info page periodically for review.
  - Set Up Employee Groups – Not Required. This task can be checked as complete once employee groups are added or if no employee groups are needed.
  - Set Up Reporting Fields – Not Required. This task can be checked as complete once custom reporting fields are added or if no custom reporting fields are needed.
  - Set Up Data Mapping – Not Required. This task can be checked as complete once data file mappings are added or if no data file mappings are needed.
  - Add Users – Not Required. This task can be checked as complete once additional users have been added or if no additional users are needed.
  - Set Up Worxtime Alerts – Not Required. This task can be checked as complete once alerts have been added or if no alerts are needed. However, it is highly recommended that you visit the Alerts page and review the possible alerts you can set up.
- Discrepancies
  - Resolve Employee Discrepancies – You must resolve all employee upload discrepancies for the task to be checked as complete. The task will automatically be completed once discrepancies are resolved.
  - Resolve Timesheet Discrepancies (Batch #) – Not Required. You must resolve the timesheet discrepancies for the given batch ID for the task to be checked as complete. The task will automatically be completed once discrepancies are resolved.

- IRS Reporting
  - Set Up 1094/5 Rule Sets (Year) – This task will be assigned if the company has a valid contract type for a given year and does not have IRS 1095/4 rule sets added for the same year. The contract type can be found under the Company Info page under Administrative Information. Valid Contract types are Tracking and Reporting, Reporting Only, or Tracking Only. This task will need to be manually checked as complete once rule sets have been added.

- Pay Periods
  - Upload Timesheets (End Date) – You must add timesheet records for this pay cycle end date either by upload or manual entry in order for this task to be completed. This task will still need to be manually checked as complete once hours are in the system.

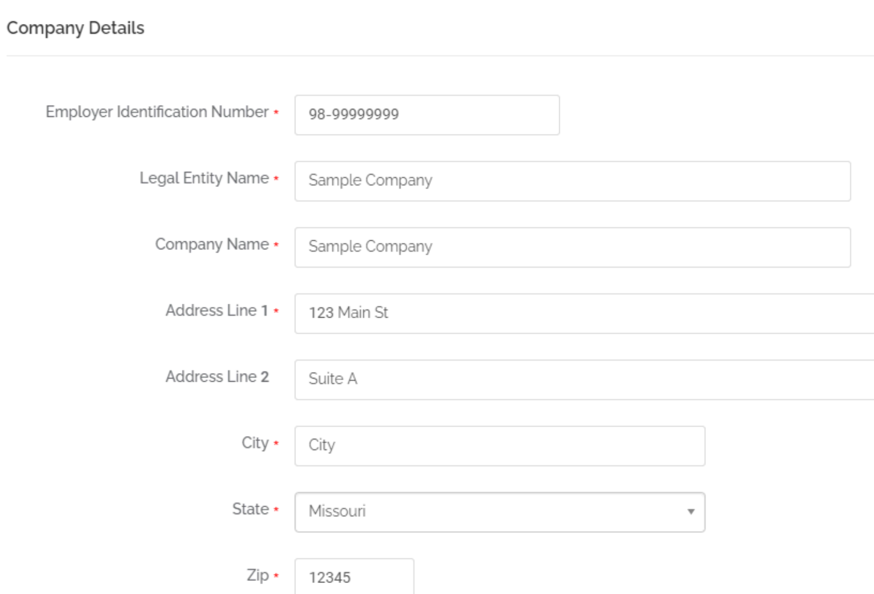
What is included in the Company Info tab?

Purpose/Summary:
Learn how to navigate the Company Info tab.

Details:

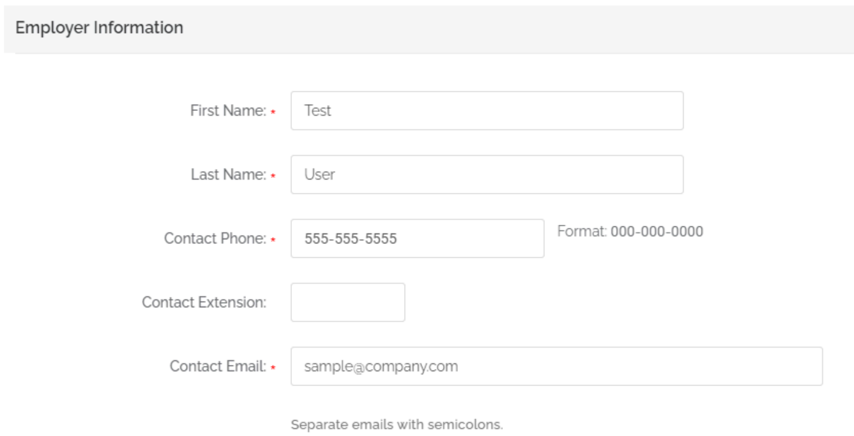
The “Company Info” section is divided into four parts:

1. **Company Details**



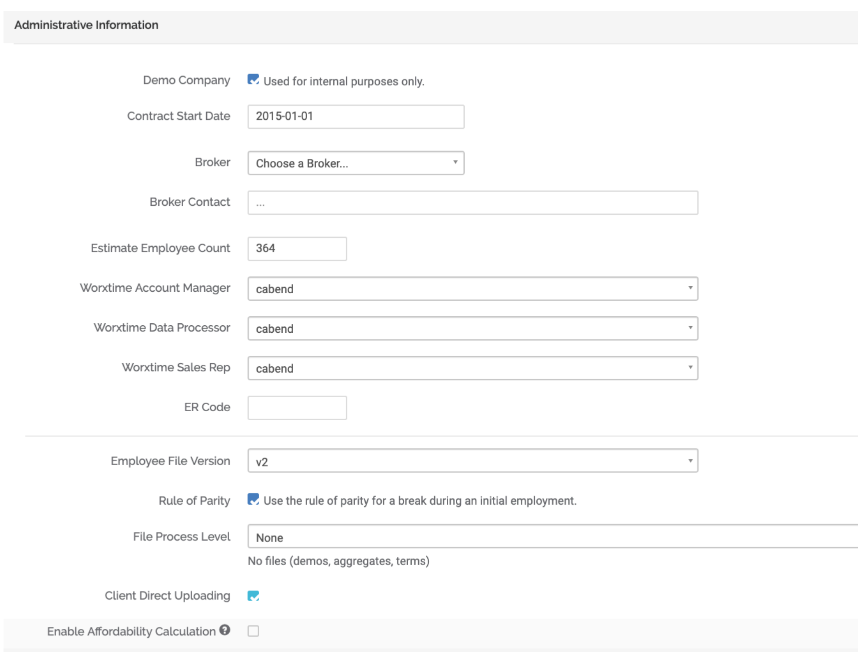
This includes basic information about your company like EIN (Tax ID), legal name, and address.

2. Employer Information



This includes contact information for the person in your company who is responsible for maintaining your Worxtime database.

3. Administrative Information



This includes information that will be filled out by Worxtime, including your Contract Start Date, Broker, 1095-C Fulfillment Status, Contract Type, Data Processor, and Account Manager.

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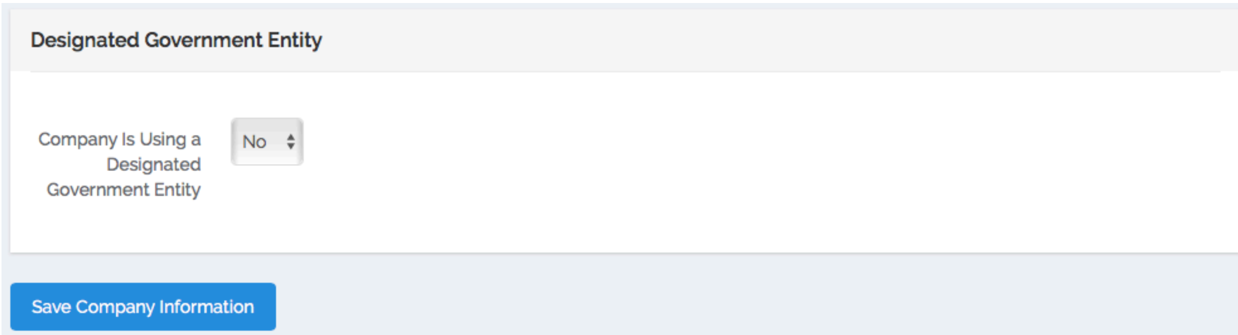
4. Designated Government Entity



This indicates whether or not the selected company is utilizing a designated government entity for reporting purposes.

Note: If you need to update any of the fields in the Company Info section, correct the necessary field(s) and click the blue “Save Company Information” button at the bottom of the page. If the information is successfully updated, you will be presented with a green banner at the top of the page stating the following:

Success! – Company Setup has been updated.

If you are not presented with this banner, you may have entered something incorrectly. Erroneous entries will be highlighted in red. You will need to correct these entries and save the page again.

Important: The Employer Contact E-Mail- All automated discrepancy notifications will be sent to the email address(es) noted in the Employer Contact Email field. Please ensure the right contact(s) are listed here. You may include more than one by separating the email addresses with a semicolon.

How do I add pay period information to Worxtime?

Purpose/Summary:
Learn how to add pay period information to the Worxtime system.

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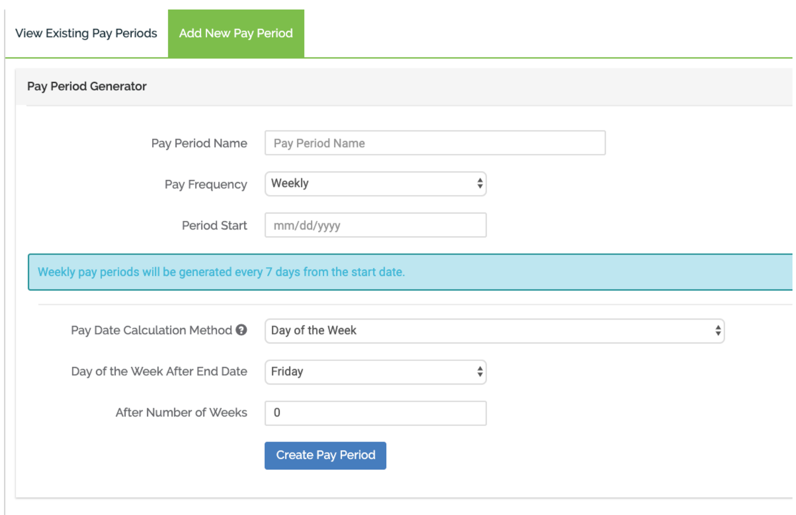
Details:

Worxtime requires your company pay period schedule to determine when the system should expect your Employee Demographic and Timesheet uploads. The start and end dates of your pay periods are also used to structure dates for single-employee, single-pay period hours entries, should you choose to utilize that feature.

The Pay Periods Setup is populated using the pay period schedules requested during your Implementation. Every pay period schedule provided to Worxtime will be assigned a name, and employees are assigned to their pay period schedule on the Employee Demographic upload. Pay period names should be discussed with your Account Manager during Implementation.

How to Add a New Pay Period



If you need a new, additional pay period schedule for some or all of your employees, please contact your Worxtime Representative or Client Services at clientservices@worxtime.com. Any Worxtime Representative can correct your pay period schedule, or create a new pay period schedule. You will need to provide the Worxtime Representative with the new and at least three consecutive start and end dates for the new pay period schedule.

If you need to create a new pay period schedule, it is best to send the pay period start and end dates to a Worxtime Representative and allow them to input the new schedule for you. However, if you need to input the pay period schedule yourself, please follow the instructions outlined below.

Worxtime requests that you alert Client Services or your Account Manager whenever you make changes to any portion of the company setup.

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Automatically Populating Pay Period Schedules in Worxtime
Creating new pay period schedules in Worxtime is easy and quick. Clicking on "Pay Periods" under My Company will take you to the "View Existing Pay Periods" page where you will see all of the pay period schedules that currently exist for your company.

To add a new pay period schedule, click on "Add New Pay Period."

Choose a name for the pay period. Most names are descriptors of the pay period type, like "weekly" for a weekly pay period or "monthly" for a monthly pay period. Select your pay period type. Weekly, biweekly, semimonthly, and monthly pay period schedules are supported.

You will be required to enter the following for each pay schedule type:

- Weekly – the start date of the first pay period encompassing the first day of the first measurement period.
- Biweekly – the start date of the first pay period encompassing the first day of the first measurement period.
- Semimonthly – the start date of the first pay period encompassing the first day of the first measurement period, the day of the month that the first pay period begins, and the day of the month that the second pay period begins.
- Monthly – the start date of the first pay period encompassing the first day of the first measurement period and the day of the month that the pay period starts on.

  Note: The "Pay Period Start Date" field must always be the FIRST pay period encompassing the start date of the FIRST measurement period that contains your historical data, or the pay period schedule will not build backwards to encompass all of your historical data.

Other Types of Pay Period Schedules
Worxtime can accommodate other types of pay schedules, or irregular pay schedules that cannot be automatically populated per the instructions outlined above. However, a Worxtime Representative will need to enter this pay period schedule for you.

Please contact your Account Manager or Client Services at clientservices@worxtime.com for irregular pay period schedule accommodation.

What are Measurement Periods?

Purpose/Summary:
Learn what measurement periods are and how they are used by the Worxtime system.

Details:

Your Account Manager should brief you on measurement groups during your initial Implementation. Per the Affordable Care Act, employees must be measured to determine whether or not they are eligible for an ACA-mandated offer of health coverage. Employees are measured, offered coverage, and stabilized on their insurance over the course of three regular periods.

The Measurement Period: Measuring Eligibility

Employees are measured for eligibility for an ACA-mandated offer of health insurance. To qualify for an offer, employees must average at least 30 hours per week or 130 hours per month, or the employee must obtain a total of 1,560 hours (subject to change for educational institutions) in the calendar year. Eligible employees are called Full-time Employees, or Full-time Equivalent Variable Hour Employees.

The measurement period can occur in intervals of 3, 6, 9, or 12 months. Please note that the Stability Period cannot be shorter than the measurement period. That is, if you choose a 12-Month measurement period, you must choose a 12-Month Stability Period. If you choose a 6-Month measurement period, you may choose a 6, 9, or 12-Month Stability Period.

Standard Measurement Period refers to your ongoing measurement period, which occurs in regular intervals every year. All employees will eventually conform to the Standard Measurement Period.

Initial Measurement Period refers to the initial eligibility measurement period for new variable hour hires. Variable hour new hires will enter an Initial Measurement Period, which will measure them monthly for eligibility until they complete one full Standard Measurement Period. Upon completion of one full Standard Measurement Period, the employee will join the rest of your workforce on the Standard Measurement Period assessment schedule.

The Administrative Period: Administering Offers of Coverage

Per the Affordable Care Act, employers must offer health insurance to employees who have been deemed eligible by the 91st day following the applicable measurement period. This 91 day period is called the Administrative Period. Worxtime offers Administrative Periods in intervals of 30, 60, or 90 days.

If the Employee is not deemed eligible for coverage during the measurement period, the employee will not enter an Administrative or Stability Period. They will go directly into another measurement period.

The Stability Period: Stabilizing Employee Status

The Stability Period follows the Administrative Period and typically runs alongside the company's benefit plan year. The Standard Stability Period must be at least equal in length to the measurement period. During the Stability Period, the employee's eligibility status is locked in. Health coverage offered to eligible employees cannot be rescinded, no matter how few hours the employee works during the Stability Period, unless the individual's employment is terminated or the employer feels that they have met the standards set forth by the ACA for early termination of benefits.

Measurement Groups in Worxtime

Measurement groups in Worxtime are date sets for the Standard Measurement, Administrative, and Stability Periods for your workforce. Your Account Manager will help you select these dates during your Implementation and set the measurement groups up for you.

1094/1095-C Rule Sets attach to your measurement groups, so if you offer different types of health coverage to different employee groups, you may have more than one measurement group with the same set of dates and different 1094/1095-C Rule Sets attached.

If you need to have your measurement group dates altered, please contact your Account Manager or Client Services at clientservices@worxtime.com.

What are Employee Groups?

Purpose/ Summary:
Learn what employee groups are and how they operate within the Worxtime system.

Details:

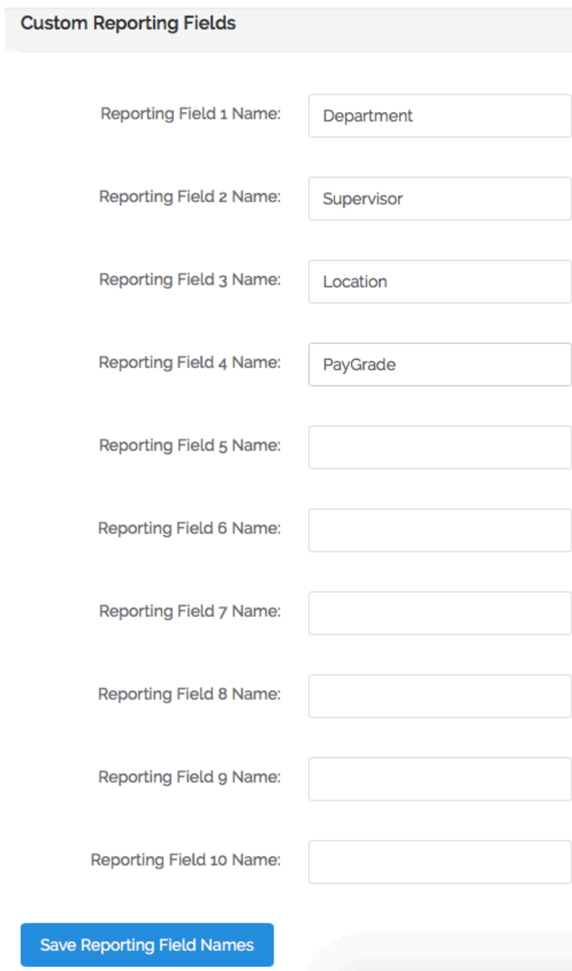
Employee groups are for educational institutions who employ individuals that work less than twelve months per calendar year. If employees of educational institutions have a break that is longer than four consecutive weeks during which they do not work (summer vacation), those employees are eligible for a reduction in the total number of hours they need to work per calendar year to qualify for an ACA-mandated offer of health insurance.

Per the IRS, this break in service must be between a minimum of four consecutive weeks and a maximum of sixteen consecutive weeks. Worxtime will automatically calculate the number of hours each employee group needs to have their total hours requirement reduced by. During your initial Implementation, your Account Manager will request the starting and ending date for desired education break for each of your employee groups (you may have more than one employee group if certain types of employees have different beginning and ending dates for their education break(s)). Employee groups will be created for you by your Account Manager during your initial Implementation. However, if you would like to alter the dates for your employee groups or enter new dates for the next reporting year, click on “Employee Groups Setup” under the My Company drop-down on the left navigation menu. Alternatively, you can select “Employee Groups” from the My Company navigation ribbon if you are in another portion of the My Company section.

What are Reporting Fields?

Purpose/Summary:
Learn how to use reporting fields to create custom employee groups.

Details:



Reporting Fields, also known as Custom Reporting Fields (CRF), are an optional selection when you set up your Worxtime database with your Account Manager during your Implementation. These are customized fields that you may use to group your employees in any manner you wish. These fields can be added to the Employee Demographic file so that each employee can be labeled according to the Custom Reporting fields.

You may create up to ten Custom Reporting fields. Some examples of possible Custom Reporting fields include the following:

- Department
- Supervisor
- Location
- Pay Grade
- Bargaining Unit
- Control Group
- Union
- Job code

If you would like to add or remove Reporting fields for your Worxtime database, please contact your Account Manager or Client Services at clientservices@worxtime.com. Please do not attempt to alter the "Reporting Fields" section listed under the "My Company" drop-down.

How do I use the Data Mapping Tool?

Purpose/summary:
Learn how to use the Data Mapping Tool to minimize manual data manipulation.

Details:

Data Mapping and Translation Tags are tools that can be utilized to help audit and customize your data file uploads. Data Mapping allows you to customize the layout of your file template. Translation Tags allow you to translate the data in certain fields of your Employee Demographic and Coverage uploads into Worxtime-readable data, virtually eliminating the necessity of any outside programming.

Your Account Manager will review Data Mapping and Translation Tags with you during your initial Implementation. These fields should be set up for you. If alterations to the Data Mapping or Translation Tags are necessary and you require aid, please contact your Account Manager or Client Services.

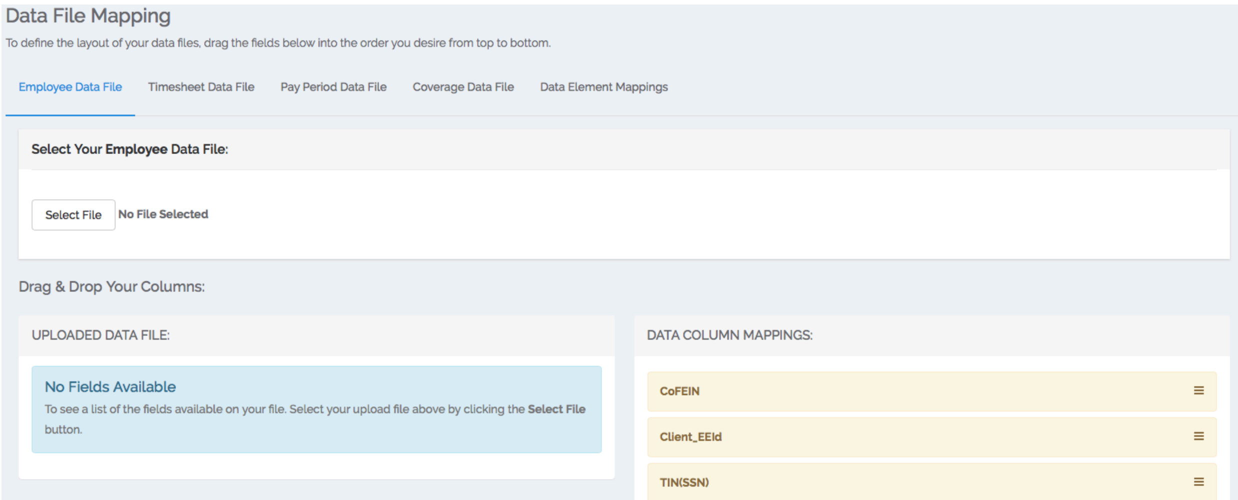
Data Mapping

You can view the Data Mapping tools by clicking on "Data Mapping" under the "My Company" drop-down on the left navigation menu. You will arrive on the "Data File Mapping" page.

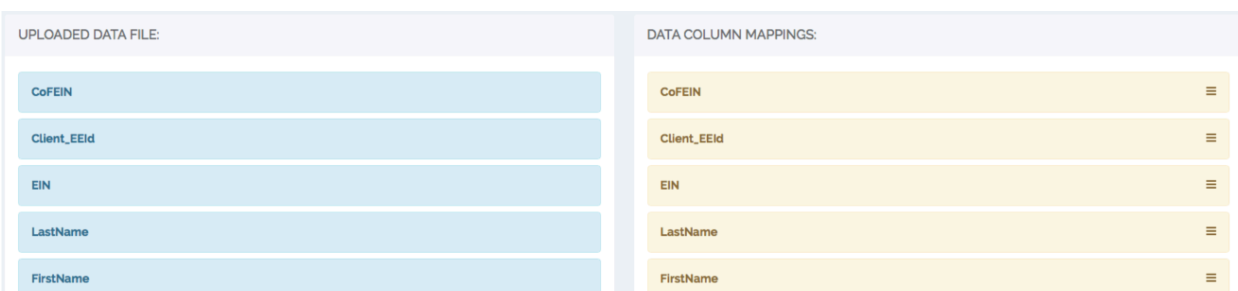
If you receive an "invalid number of columns" error message when you attempt to upload a file into Worxtime, you can use the Data Mapping section to test the file you wish to upload against your upload Template.

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

When you first arrive on the Data File Mapping page, you will see five tabs at the top of the page. If you need to test an Employee Demographics file, stay on the "Employee Data File" page. If you are uploading a different type of file, select the option below that matches the file you are attempting to upload.

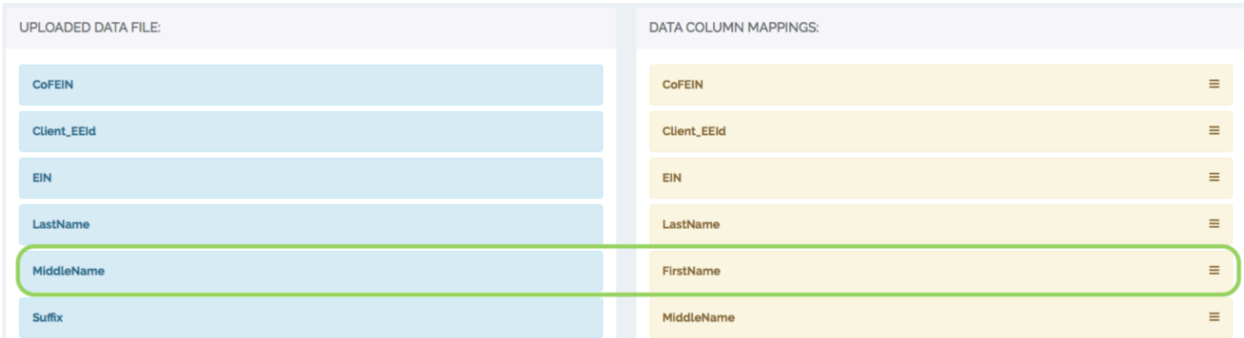


Once you have navigated to the correct section, click on "Select File" and navigate to the .csv file on your computer that you need to map against the default template. Choosing the file will display your columns on the left side of the page, in blue. On the right side of the page, in gray, you will see the default order of the columns. This is the order the system expects your file to be in. Compare the blue mapping to the yellow mapping to see if the data is properly aligned. Every name on the left should match the name on the right. You may name the sections whatever you like (ex: you may name your "EIN" column "SSN" or "TIN" instead), but the order of the data columns must be the same.



Carefully, check the columns on the uploaded file and your data column mappings after you upload the file. If the rows on the left do not match the rows on the right, some data is missing or has been erroneously included in your data file. After the columns corrected in your file, upload the corrected file to Data Mapping again and re-check your columns. In the example below, the columns circled in green do not match. This is because we forgot to include the "FirstName" field on our upload.

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



When you have more data columns on your file than appear on your Worxtime Template, the Data Mapping will appear as it does in the example below. Each additional field will be labeled in the format Extra_Field_#. Mismatching numbers of columns will cause your data to enter the system incorrectly. If you need additional Custom Reporting fields for your template, please contact Worxtime Client Services or your Account Manager.

Below, you will see a number of blank blue banners. This means that Data Mapping has detected phantom columns (columns with no data or header) on your file. These need to be deleted.

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After you delete the phantom columns on your file, you will click on the “X” next to any column labeled Extra_Field_#. In addition, be sure to highlight a handful of additional columns to the far right of your last data column on your excel file. Click “delete” and then re-save the file. You may need to click “Reset Mapping” above the gray columns on the Data Mapping page to standardize your mapping order again.

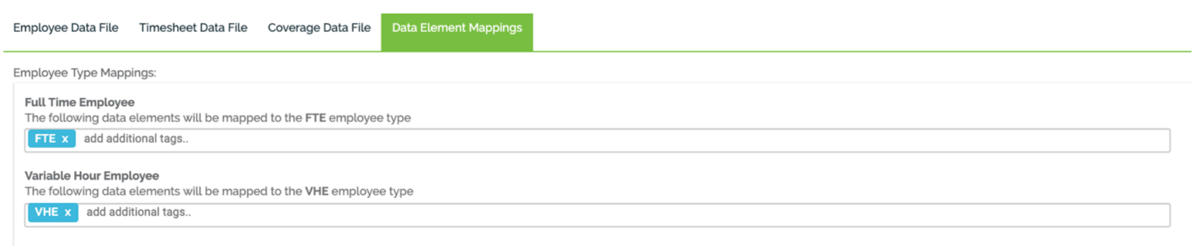
Anytime you need to reorganize your column order, you can click on the gray fields and drag them into the desired order. Please note that any file you upload afterwards will need to be in this order. If you upload a new file into Worxtime that does not match your data mapping exactly, your data will not be imported correctly.

Data Element Mappings

Data input has become exceptionally flexible with the introduction of Data Element Mappings. This feature eliminates the need for outside programming. Data Element Mappings allow clients to enter ANY data into certain columns of the Employee Demographic and Coverage data uploads. As long as the letters numbers, and/or symbols that were entered have been assigned to a Data Element Mappings, Worxtime will automatically translate any data entered into Worxtime formatting.

To edit Data Element Mappings, find the left navigation menu and click on the My Company drop-down. Now, click Data Element Mappings.

You will be taken to the Employee Demographic Data Mapping page. Note the five directory tabs at the top of the page. Click on Data Element Mappings.



Here, you can assign Data Element Mappings to various columns of the Employee Demographic and Coverage data files. At first, you will see that only the Worxtime standard labels have been assigned to each field.

Employee Demographic File: Employee Type Translations

You can map any word(s) entered into the Employee Type field on the Employee Demographic upload to translate to either of the following:

- FTE (Full-time Employees)
- VHE (Variable Hour Employees)

Employee Demographic File: Measurement Group Name Translations

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

You can map any word(s) entered into the Measurement Group Name field on the Employee Demographic upload to translate to your Measurement Group Names, including the names of your employees. The pre-set Measurement Group Name Mappings are your Measurement Group Names set up during implementation by your Worxtime Account Manager.

Employee Demographic File: Employee Group Name Translations
You can map any word(s) entered into the Employee Group field on the Employee Demographic upload to translate to your Employee Group names. The pre-set Employee Group Mappings are your Employee Group names set up during Implementation by your Worxtime Account Manager.

Employee Demographic File: Pay Period Name Translations
You can map any word(s) entered into the Pay Period field on the Employee Demographic upload to translate to your Pay Period names. The pre-set Pay Period Mappings are your Pay Period names set up during Implementation by your Worxtime Account Manager.

Coverage File: Relationship Translations
You can map any word(s) entered into the Relationship field on the Coverage upload to translate to any of the following:

- E (Employee)
- EC (Employee Cobra)
- D (Dependent)
- DC (Dependent Cobra)

Coverage File: Enroll Status Translations
You can map any word(s) entered into the Enroll Status field on the Coverage upload to translate to either of the following:

- E (Enrolled)
- W (Waived)

Your Worxtime Account Manager will help you set up your Data Element Mappings during your Implementation. If you need to change Data Element Mappings , please contact your Account Manager or Client Services at clientservices@worxtime.com.

How do I manage users?

Purpose/Summary:
Learn how to add and manage user permissions.

Details:

You can view all the users who have access to your Worxtime database by clicking on the "Users" tab under the My Company drop-down on the Main Navigation menu. A list of users who have access to any portion of your Worxtime database will appear on the "View Existing User Accounts" page. From this page, you can add a new user, edit user accounts, set permissions/restrictions, and delete users when necessary.

Additional users can be added at any time by clicking "Add a New User." A new user must be an active employee who has already been imported into your Worxtime database. If you have not uploaded employees yet, you can add them as a single entry utilizing the single entry method. If a non-employee needs access to Worxtime, please reach out to your Account Manager or Client Services at clientservices@worxtime.com.

When creating the new login, select the employee from the drop-down menu. Enter the employee's e-mail address and create a username and password for the employee. The username must be unique to Worxtime (you cannot use a username that another Worxtime client has already created). Set the Status selection to Active. When all of the information has been entered, click the blue "Add New User" button to save the information.

Once you have added a new user you must set the permissions. Click on Permissions to the right for the new user you just added. The default will be Read/Write for all which is editable, however, you must save the permissions in order for the permissions to be applied to the system. The only one you more than likely will need to change is the last one for viewing employee SSNs. The default is to show only the last four digits. You may change that to all access if needed then click the blue Save button to apply the permissions. Now you can provide the username and password to the new user as they may now log in to access the system.

Editing User Accounts

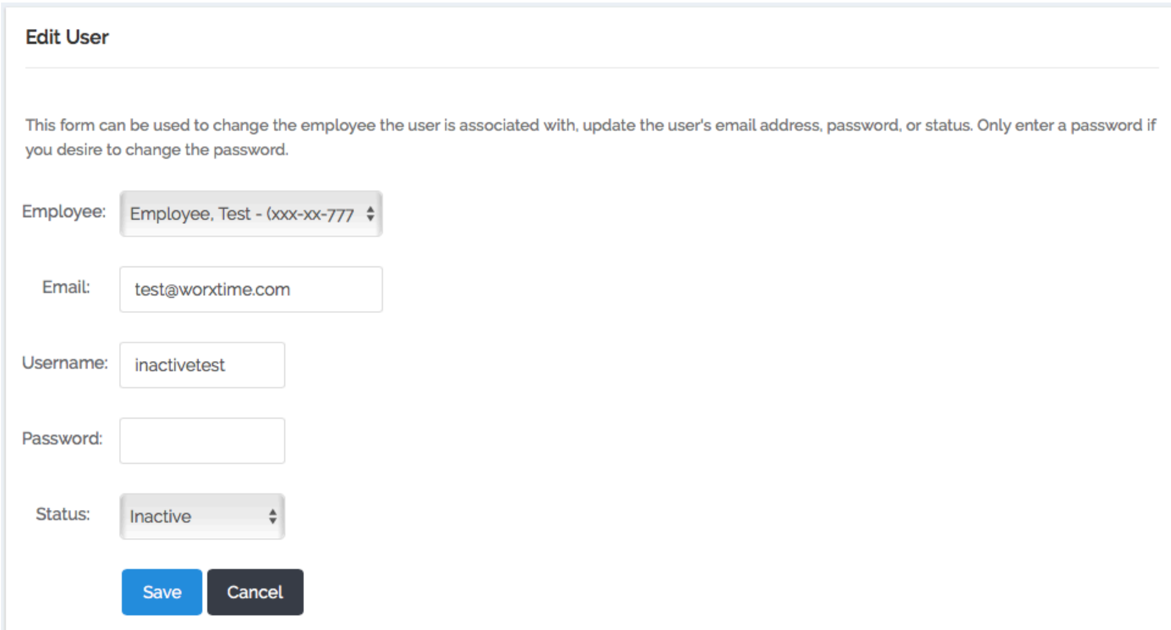
The View Existing User Accounts screen is pictured below. Here, you can make adjustments to user information, alter Permissions/Restrictions, and delete users if necessary.

Manage Users

Username	Firstname	Lastname	Status	Actions
inactivetest	Test	Employee	Inactive	Edit Permissions Restrictions Delete
User1	Test	User One	Active	Edit Permissions Restrictions Delete
User2	Test	User Two	Active	Edit Permissions Restrictions Delete

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

Clicking on “Edit” will allow you to make adjustments to user emails, usernames, passwords, and user status.



Changing User Permissions
Clicking on “Permissions” will take you to the “Managing User Permissions” screen. Here, you can give users certain permissions, or limit user access to certain permissions.

Editable permissions include: Add a New Employee, Add a New Timesheet, Alerts, Company Setup, Compliance, Data History, Employees, Measurement Period Setup, Notifications, Pay Periods Setup, Reporting Fields Setup, Reports, Time & Attendance, Time Clock, Timesheets, Upload Employees, Upload timesheets, User Permissions & Restrictions, User Setup, View Social Security Numbers.

There are three access levels for most permissions:

1. Read/Write – The user can read and make interact with the selection, editing information or uploading data.
2. Read Only – The user can see the information but cannot interact with it in any way.
3. None – The user cannot access this portion of the system.

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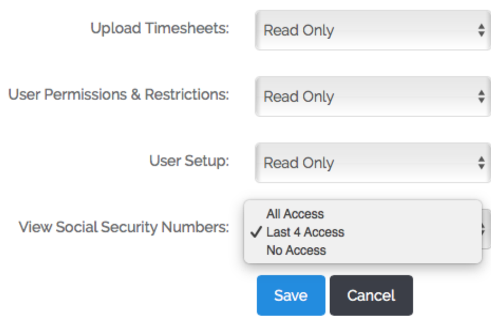
View Social Security Number has a different set of permission options:

1. Last 4 Access – The user can only see the last four digits of each social security number.
2. All Access – The user can see full social security numbers.
3. No Access – The user cannot see any digit for any social security number.

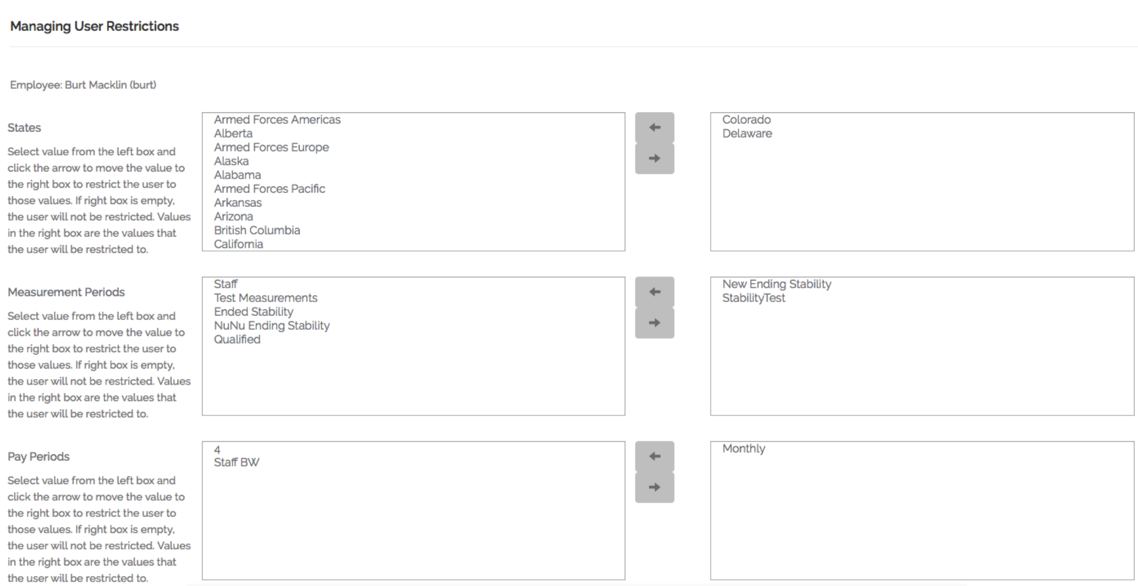


After you have finished altering the user's permissions, click "Save."

> ***Note:*** Restricting users in any fashion will also restrict them from completing the Audit Wizard at the end of the year. Only a completely unrestricted user with full permissions will be able to complete the Audit Wizard.

Changing User Restrictions

Clicking on "Restrictions" will take you to the Managing User Restrictions page. This page allows an administrator to restrict users from viewing certain demographic groups. For example, you can restrict users from viewing employees in certain States, Measurement Groups, Pay Periods, or defined by certain Custom Reporting Fields.



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

On the left side of the screen, you will see all the groups that the user can be restricted from seeing. The right set of boxes will be blank initially. If all the boxes on the right are blank, the user is completely unrestricted. They can see data for all employees in the system. If you would like to restrict a user to certain groups, use the middle arrows to move the groups you want the user to see into the boxes on the right. When you move groups into the boxes on the right, the user will only see the groups in the boxes on the right.

Let's look at an example.

We have employees in several measurement groups. This user only needs access to employees in the "Qualified" Measurement Groups. We do not want the user to see any information about employees in other measurement groups.

Click on the group that the user needs access to. Now, click on the bottom middle arrow, which is facing the right, to transfer the measurement group into the box on the right.

Click on "Save Restrictions" at the bottom of the page to apply the restrictions.

If you need to remove restrictions, click on the group in the right box and use the top middle arrow, which is facing the left, to move all the groups back into the left box.

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How do I add 1094/1095-C rule sets?

Purpose/Summary:
You can update your 1094/5-C rule sets within the Worxtime platform.

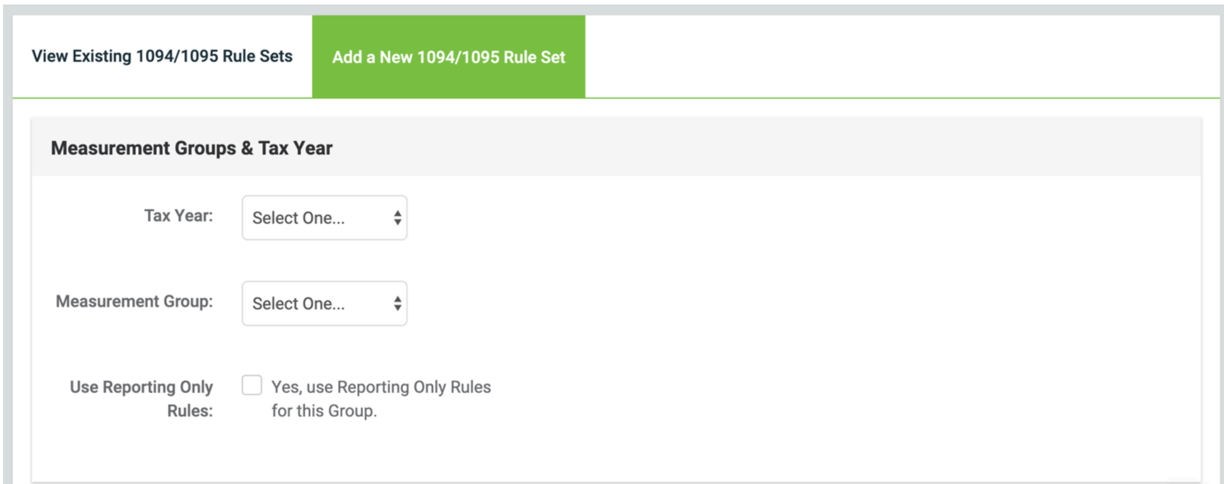
Details:

The 1094/1095 Reporting section contains information pertaining to Section 6055/6056 of the Affordable Care Act. This information is called a 1094/1095 Rule Set. Each 1094/1095 Rule Set your company requires must be attached to a measurement group, because your employees are organized into measurement groups. These measurement groups measure different groups of your employees for eligibility, and then fill out their 1095-C forms in accordance with the 1094/1095 Rule Set that is assigned to the measurement group the employee belongs to.

You may have more than one 1094/1095 Rule Set, and thus more than one measurement group, if your company offers different health insurance plans to different groups of employees. The 1094/1095 Rule Set information includes the following:

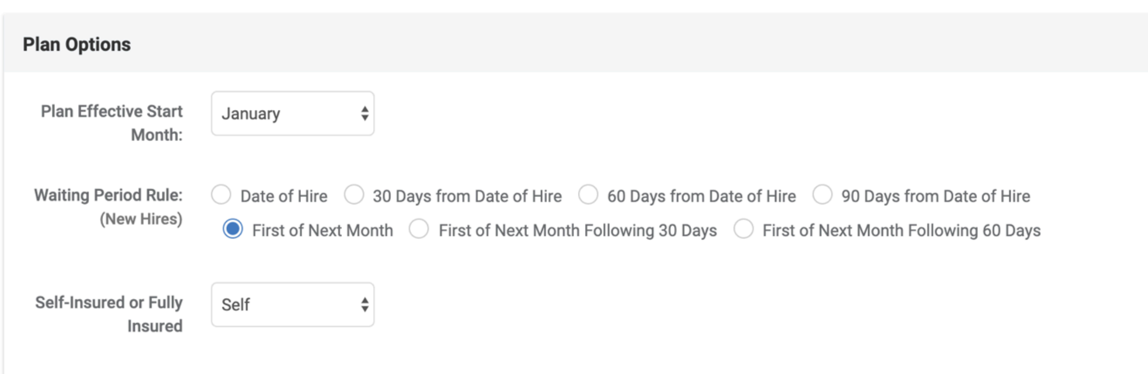
- The Tax Year that this 1094/1095 Rule Set applies to.
- The Plan Effective Start Month is the date that the Insurance Plan restarts every year.
- The Waiting Period Rule for New Hires is how long newly-hired full-time employees need to wait before they are offered medical insurance.
- Whether your company's health plan is Fully Insured (insured through a tertiary agency like State Farm) or Self Insured (the company insures its own employees).
- The Default Method of Offer the employer wants to use. If the lowest employee share premium the plan offered is less than $103.15 (as of April 2022), and at least minimum essential coverage has been offered to the employee's spouse and dependents, Worxtime recommends the Default Method of Offer 1A. If the lowest possible share premium the plan offers is greater than $103.15 (as of April 2022), and at least minimum essential coverage has been offered to the employee's spouse and dependents, Worxtime recommends the Default Method of Offer 1E. However, all employers are unique and should consult their own legal and tax counsel to decide what Default Method of Offer to use.
- The Employee Only Cost is the lowest employee share premium that the employee can pay for employee-only insurance.
- The Safe Harbor tells the IRS why the employer qualifies for exemption from an assessable penalty payment in that month. If the Default Method of Offer is 1A, Worxtime recommends a Safe Harbor of Federal Poverty Level. If the Default Method of Offer is 1E, Worxtime recommends a Safe Harbor of Rate of Pay. Worxtime does not generally recommend W-2, but the employer may choose it if their legal and/or tax counsel tell them to do so.
- The COBRA Cost is not mandatory, but if the employer has active employees on COBRA, it should be entered.

When a new 1094/1095 rule set needs to be entered into the system, you will click on the tab labeled "Add a New 1094/1095 Rule Set."



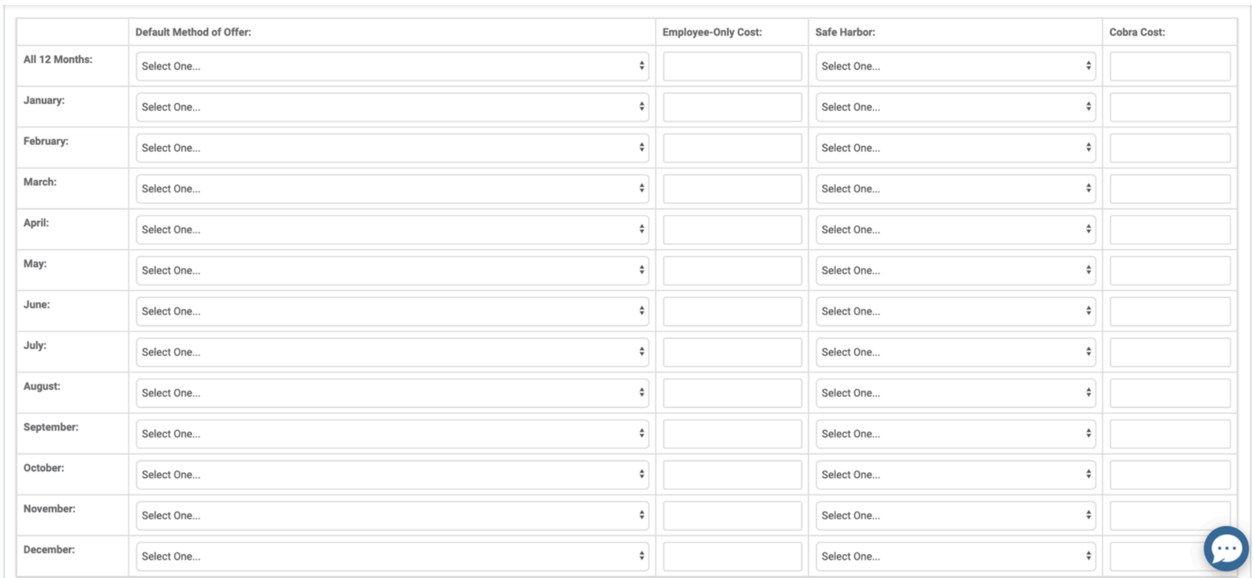
Under "Add a New 1094/1095 Rule Set," there are three different sections. In the first section, you will need to select the tax year and measurement group you will be attaching this rule set to. You will only be able to set up a 1094/1095 rule set for a measurement group in the system. If you need an additional rule set, a new measurement group must be created.

The next section of the Rule Set will cover your plan options. Select the date your insurance plan year begins, how long your full-time new hires need to wait before receiving an offer of health coverage, and whether your insurance plan is self or fully insured.



The last section of the Rule Set covers your Default Method of Offer, Employee-Only Cost, Safe Harbor, and COBRA Cost.

Under Default Method of Offer, you will be able to select what Default Method of Offer you would like to choose for this measurement group. You should confer with your legal or tax counsel if you are unsure of what Default Method of Offer to use. If this information remains the same for all twelve months of the year, you will only need to select a Default Method of Offer in the drop-down labeled "All 12 Months." If the Method of Offer differs by month, you will need to select for each individual month.



	Default Method of Offer:	Employee-Only Cost:	Safe Harbor:	Cobra Cost:
All 12 Months:	Select One...		Select One...	
January:	Select One...		Select One...	
February:	Select One...		Select One...	
March:	Select One...		Select One...	
April:	Select One...		Select One...	
May:	Select One...		Select One...	
June:	Select One...		Select One...	
July:	Select One...		Select One...	
August:	Select One...		Select One...	
September:	Select One...		Select One...	
October:	Select One...		Select One...	
November:	Select One...		Select One...	
December:	Select One...		Select One...	

When entering the Employee Only Cost, be sure to entire the monthly employee share of the lowest possible premium for self-only coverage.

Select the Safe Harbor from the next drop-down menu. Consult your legal or tax counsel if you are unsure what Safe Harbor needs to be used.

If some of your active employees are on COBRA, you will need to enter the monthly COBRA cost.

Once all the information has been entered for the 1094/1095 Rule Set, click the blue "Save" button at the top of the page. The new 1094/1095 Rule Set will appear on the View Existing 1094/1095 Rule Sets page. If any adjustments need to be made to the Rule Set, click the "Edit" button on the right. The edit page will be identical to the Add a New 1094/1095 Rule Set page.

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How do I upload data?

Purpose/Summary: Learn how to upload your data into the Worxtime system.

Details:

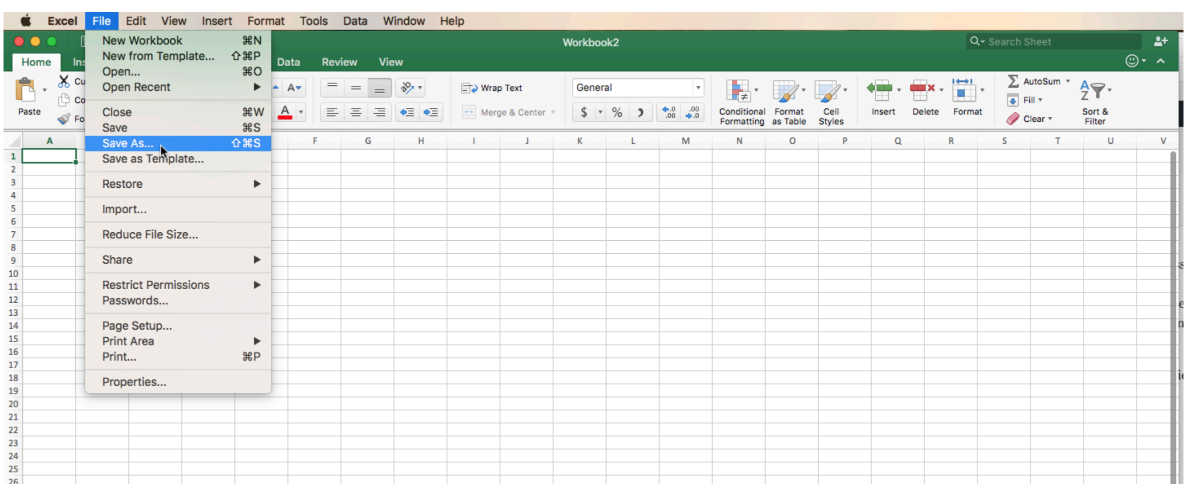
Tracking and Reporting clients upload three different data files into their Worxtime database regularly: Employee Demographic Files, Timesheet Files, and Coverage Files.

These three files may be processed two ways:

1. Upload to the Data Team – You submit your file to a secure FTP site. The Worxtime Data Team will examine the file you have submitted for possible errors, and then upload the submitted data to your Worxtime database. This process can take up to 48 hours.
2. Direct Upload – You load your file directly into the Worxtime database. These files will upload almost instantly. The Employee Demographic and Timesheet changes will be immediately available in your database, and any updates to compliance data will be updated at the next site-wide compliance update, which runs multiple times throughout the day. You will need to address any errors or discrepancies on your own, or with the help of Worxtime Client Services.

Clients are permitted to directly upload their files after several submissions to the Data Team have passed inspection and are uploaded free of discrepancies. If you would like to discuss the possibility of direct uploading your data, please contact your Worxtime Dedicated Account Manager.

Please note that all files must be uploaded in .csv (Windows Comma Separated) format. To save a file in .csv format, click File > Save As.



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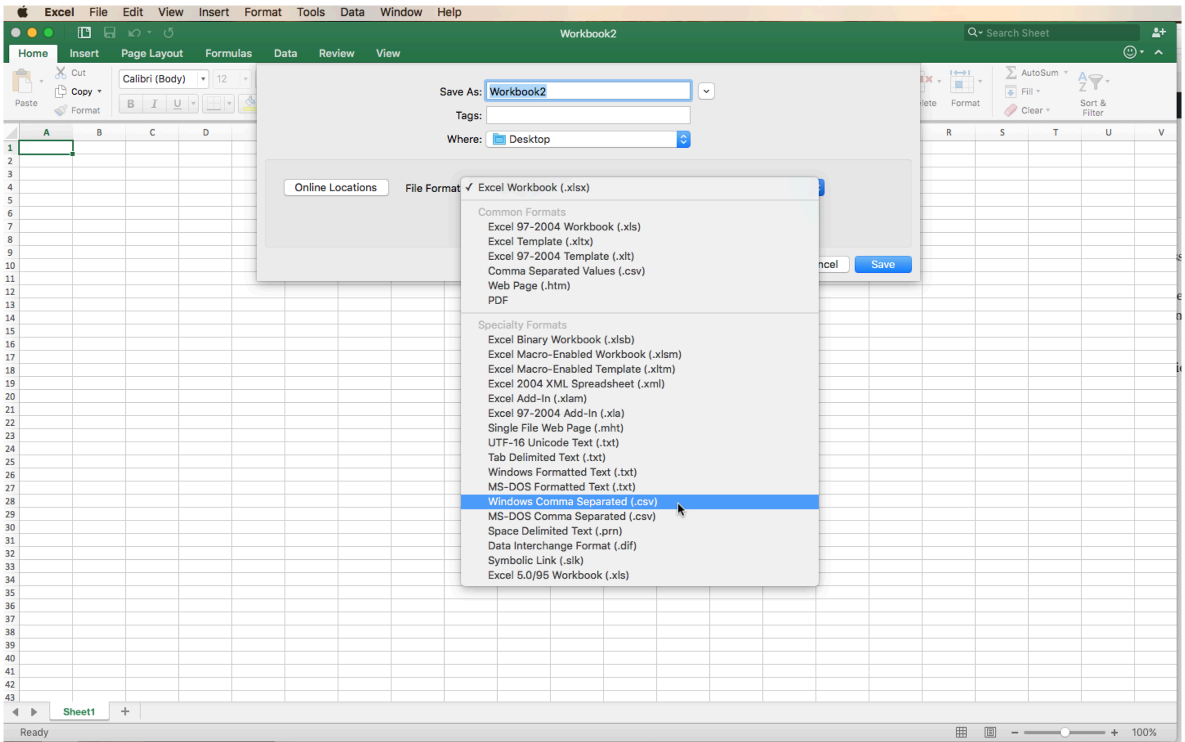
Click the File Format drop-down menu and select Windows Comma Separated (.csv) from the list of formats.



Finally, click on the blue "Save" button.

What is the Employee Demographic File?

Purpose/Summary:
Learn what the Employee Demographic File is and why it is important.

Details:

The Employee Demographic File contains data about your employee population, including what type of employee they are and how they should be categorized in your Worxtime database. Every employee should be loaded into the database either on the Employee Demographic file or individually (to be discussed in a later section) before you can attribute hours from a Timesheet to them, or upload coverage data for them.

What is the Employee Timesheet File?

Purpose/Summary:
Learn what the Employee Timesheet File is and why it is important.

Details:

The timesheets import the number of hours each employee has been paid for during each pay period. Please note that the hour totals should be the number of hours paid, not the number of hours worked. This includes paid leave of any kind.

The employee's Social Security Number on the timesheets must match the employee's Social Security Number on the Employee Demographic File. The database attaches hours to employees by matching their Social Security Number, not their name, so the Social Security Number must be exactly the same on both uploads.

The Pay Period End Date must match a pay period end date on the pay period schedule(s) you have provided to Worxtime. If you need to revise the pay period schedule(s) entered into Worxtime, please contact Worxtime Client Services.

What is the Employee Coverage File?

Purpose/Summary:
Learn what the Employee Coverage File is and why it is important.

Details:

The Coverage Files contain the health insurance coverage records for your employees (and their dependents if your company is self-insured). Dependents must be included on the coverage upload if your company is self-insured. If your company is fully insured, it is the responsibility of the insurance company to report for dependents.

Files can be uploaded with a dependent date of birth, but no dependent Social Security Number populated. However, if the IRS requests an audit to confirm offers of coverage, you will likely be asked to prove that you attempted to retrieve the dependent's Social Security Number multiple times in accordance with their requirements.

How do I upload files to the Data Team?

Purpose/Summary:
Learn how you can easily upload your files to the Data Team.

Details

Until you have been approved to upload your files directly into Worxtime, you should submit your files to the Worxtime Data Team, who will perform any necessary reformatting and upload the files for you. Please note that your company may be subject to additional fees for excessive reformatting under the terms of your contract.

To upload a file to the Data Team, use the left navigation menu to find the Employees (Employee Demographics Upload), Timesheets (Timesheet Upload), or Compliance (Coverage Upload) drop-down menus. Under the correct drop-down menu, click on the "Upload File for Data Team" link. Click "Select File", navigate to the file on your computer and select it, then click the blue "Upload" button. After you have clicked the blue button, your file name will appear on the screen. You may submit a maximum of five files in one upload. If you have several Timesheet or Coverage files to submit, you will repeat this step till all files have been submitted, sending over in groups of five at a time.

You will receive an email notification from alerts@worxtime.com informing you that the file was successfully received by the data team.

How do I directly upload files to Worxtime?

Purpose/Summary:
Learn how to upload your files.

Details:

After you submit several discrepancy-free files to the Data Team, you will be cleared to upload your data directly into the system. There is almost no turn-around time for files that are directly uploaded; you will see changes to your Employee Demographic and Timesheet data almost instantly. Changes to your Compliance data will be compiled with the next site-wide compliance update, which occurs multiple times per day.

The "Compliance Status" window above Main Navigation will tell you when the Compliance Data was last updated. Instead of uploading your files through "Upload File for Data Team," you will begin uploading your files through the "Upload Employees," "Upload Timesheets," and "Upload Coverage" links. These links function in the same manner as the "Upload File for Data Team" link and the upload process is nearly exactly the same. However, you will need to resolve any discrepancies in your data with the help of Worxtime Client Services.

Directly Uploading an Employee Demographic File

To upload an Employee Demographic file directly, find the "Employees" drop-down on the left navigation menu. Click on "Upload Employees into Worxtime." You will be taken to the Employee Uploads page. Click "Select File," navigate to the file on your computer and select it. The name of your file will appear in the File List box. After selecting the file, click the blue "Upload" button. Depending upon the file size, your file may take a few minutes to upload into Worxtime.

When your file has successfully loaded into Worxtime, a green message will appear stating "File Successfully Uploaded" along with the number of records imported. You should upload an updated Employee Demographics File at the end of every pay period, along with your Timesheets file for the pay period.

Directly Uploading a Timesheet File

To upload a Timesheet, find the drop-down menu under the left navigation menu labeled "Timesheets" and click "Upload Timesheets into Worxtime." You will be taken to the Timesheet Uploads page. Click "Select File(s)," navigate to the file on your computer, and click the blue "Upload" button. The name of your file will be displayed in the File List box.

When your file has successfully loaded into Worxtime, a yellow "File Uploaded" banner will appear on the top of the screen. You should also see the file appear in Upload History. Every timesheet file loaded into this system will appear in your Upload History.

Your Timesheet History contains several fields, described below:

- Timestamp – The exact date and time your file was loaded.
- Batch ID – The identification number your file is given when uploading it in the system. Typically, we identify your timesheet files by their Batch ID.
- Pay End Dates on Upload – The end dates of the pay periods that are present on the file. If a date reads 12/31/1969, this means your dates are not in mm/dd/yyyy format. Use the trash can icon on the far right to delete your file. Fix the date formatting and re-upload your file.
- Number of Entries – The number of pay period entries on the upload.
- Status – The file's import status. If the file was imported with no discrepancies, this will read "Imported." If there were discrepancies on the upload, this will read "Pending."
- Errors/Warning – If no discrepancies exist on the upload, a green "this upload has been successfully processed" banner will display. A red discrepancy banner will display if discrepancies exist on the upload. This will be discussed further in Errors and Discrepancies.

Directly Uploading a Coverage File

To upload a coverage file directly into Worxtime, open the “Compliance” drop-down on the left navigation menu and click “Upload Coverage.” You will need to select the tax year the coverage file applies. Please note that you cannot upload a coverage file with entries from more than one tax year on it. Coverage files can only have data from a single tax year. If you need to upload data from two separate years, please upload two separate files. You will then click “Select File(s)”, choose the file on your system, and click the blue button “Upload”. The name of your file will also appear in the File List box.

Depending on the file size, your coverage file may take a few minutes to upload into Worxtime.

When your coverage file(s) have successfully uploaded into Worxtime, the file will appear under Coverage Queue History. You will then click on the Coverage History tab to see the uploaded file(s) along with all other uploaded coverage files. If the file contains errors or warnings, a red message will appear. Errors and Warnings will be discussed in Errors and Discrepancies.

How do I enter data manually?

Purpose/Summary:
Learn how to manually enter data in the Worxtime system.

Details:

Employee, Timesheet, and Coverage records can be entered manually into Worxtime, one entry at a time. This may be useful if you have information for just a few employees to enter, like additional hours you need to add to an employee’s Timesheet record.

Manually Entering Employees

To manually enter an employee record into your Worxtime database, open the “Employees” drop-down menu under Main Navigation and click on “New Employee.”

You will be taken to the Add a New Employee page, where you will find the key fields from the Employee Demographic file. Entering information like this eliminates the process of formatting and uploading an Excel file.

Drop-down menus can be utilized to select State, Country, Employee Type, Measurement Period, Pay Period, and Employee Group data for the new employee entry. Once you have completed all of the required fields, click on the blue “Save” button at the bottom of the screen.

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

Once the employee has been uploaded, a green banner will appear stating "Success! – You have successfully added a new employee." If a required field was not completed, you will be taken to the Edit Employee page, where a red banner will appear stating "Error! – Please correct the fields below." Below, the errors displayed in red will display what needs to be altered on the record. After correcting the missing or erroneous information and saving, the green success banner should appear.

Manually Entering Hours

To manually enter hours for an employee, open the "Timesheets" drop-down under the left navigation menu and click on "New Timesheet Entry." You will be taken to the "Add a New Timesheet Entry" screen. Use the drop-down to select the employee you wish to enter hours for. Select the end date of the pay period you wish to apply the hours to, and enter the number of hours paid. If you would like to enter a Location, Paycode, or information into any of the earnings fields, please do so in the fields provided. If you would like to enter a note about why you are manually adding hours to this employee, do so in the "Note Changes" field.

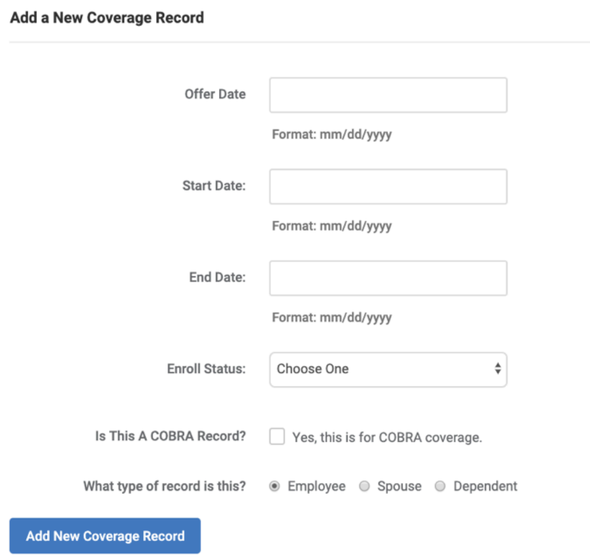
After all of the information has been entered, click on the blue "Save" button at the bottom of the page. If you do not see the end date of the pay period you wish to enter hours for, your pay period schedule entered under the My Company section of Worxtime may be incorrect. Please contact Worxtime Client Services to resolve this issue.

Manually Entering Coverage Records

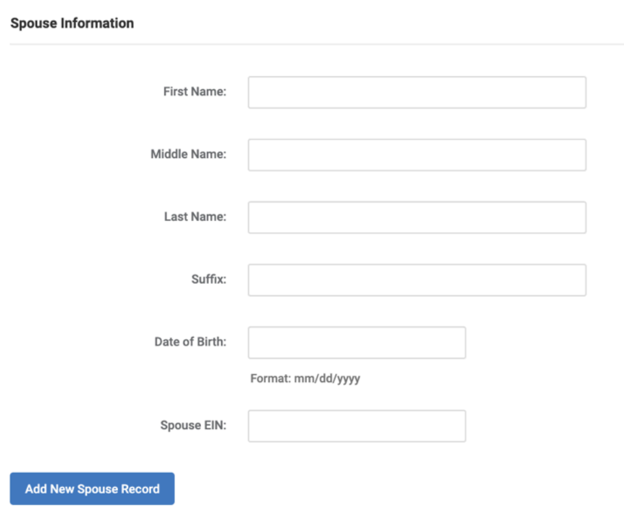
To manually enter a new coverage record for an employee, open the "Compliance" drop-down under the left navigation menu and click "New Coverage Record." You will be taken to the Add a New Coverage Record page.

To create a coverage record for an employee, use the drop-down menu to select the employee in question. Enter the coverage information in the fields provided and click the blue "New Coverage Record" button.

Use the drop-down menu to select the employee who needs a coverage record, or the employee that the dependent or spouse who needs a coverage record is covered under. The existing coverage records for the employee and any spouses or dependents that are being covered will populate. After you have selected the correct employee, use the fields below to enter the information for the coverage record you wish to create for this employee. This is the same data you would enter into a coverage file if you were uploading a .csv file for this employee.



If this is a record for a spouse or dependent, check the box by "spouse" or "dependent." Additional fields will be displayed at the bottom of the screen, requesting a name, date of birth and EIN (SSN) for the spouse or dependent.



Enter the dependent's name and their date of birth or EIN (SSN). Please be aware that if you are audited by the IRS and you have not entered SSNs for your dependents, the IRS may require that you prove you requested the dependent SSNs at least three times.

After the required information has been entered, click the blue "Add New Dependent/Spouse Record" button at the bottom of the page.

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

What is an internal server error?

Purpose/Summary:
Learn what an internal server error is.

Details:

When uploading a file into Worxtime, you may receive an Internal Server Error. There are a variety of Internal Server Errors, but most involve file formatting errors. All Internal Server Errors are formatted in the same manner. You can read the specific reason for your Internal Server Error in the first sentence of the error message.

If you need help resolving an Internal Server Error, please contact Worxtime Client Services.

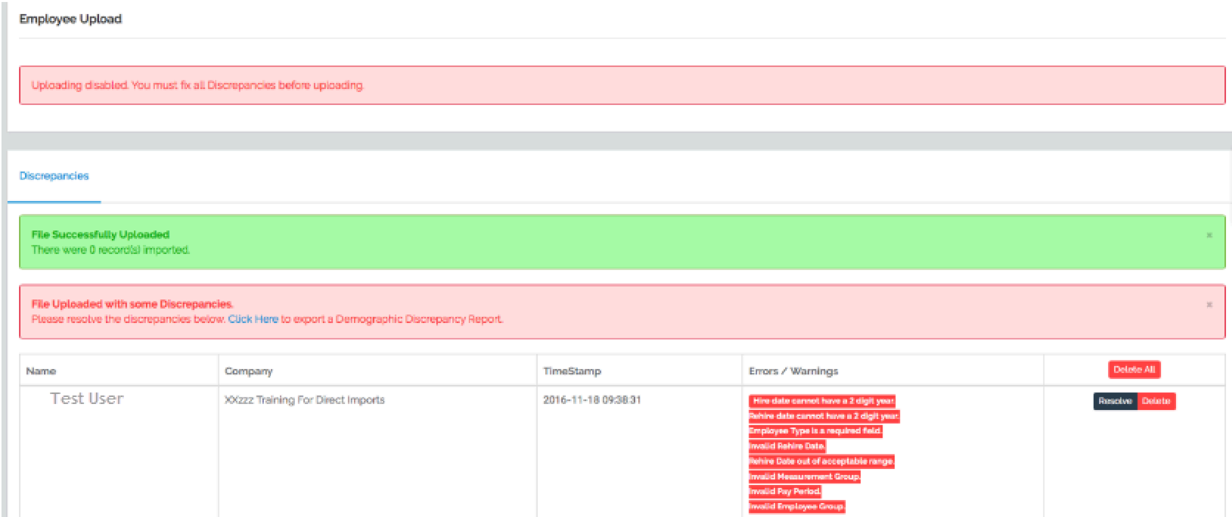
How do I resolve discrepancies?

Purpose/Summary:
Learn how to resolve discrepancies you may encounter when uploading data.

Details:

Entering information incorrectly may cause a file to fail when you attempt to upload it into your Worxtime database. Errors on your files are called "discrepancies," and these may populate when you attempt to upload your Employee Demographic, Timesheets, and Coverage Files. You can help prevent discrepancies by ensuring all required information has been included on your file before you upload it, and making sure that your Employee Demographic is current with new hires, terminations, and rehires.

Employee Demographic Discrepancies
If you are directly uploading your Employee Demographic file, you will see any discrepancies almost immediately. If you are uploading your file to the Data Team, you will be notified of discrepancies once they populate on your queued upload via email. If you receive an error message on the Employee Demographic Upload, the employee whose record was in error has not been uploaded into your database. You must resolve the error before they will be uploaded.



When you receive a discrepancy, the red banner under "Errors/Warnings" will describe the nature of the discrepancy. The Social Security Number of the employee who the discrepancy has been populated for will appear in the EIN column, accompanied by the employee's first and last names in their respective columns.

The Errors/Warnings section will display what discrepancy is preventing the file from fully uploading. Discrepancies may be resolved by deleting the file with the red "Delete All" button pictured below, fixing the data file and reuploading it, or directly through the Worxtime website.

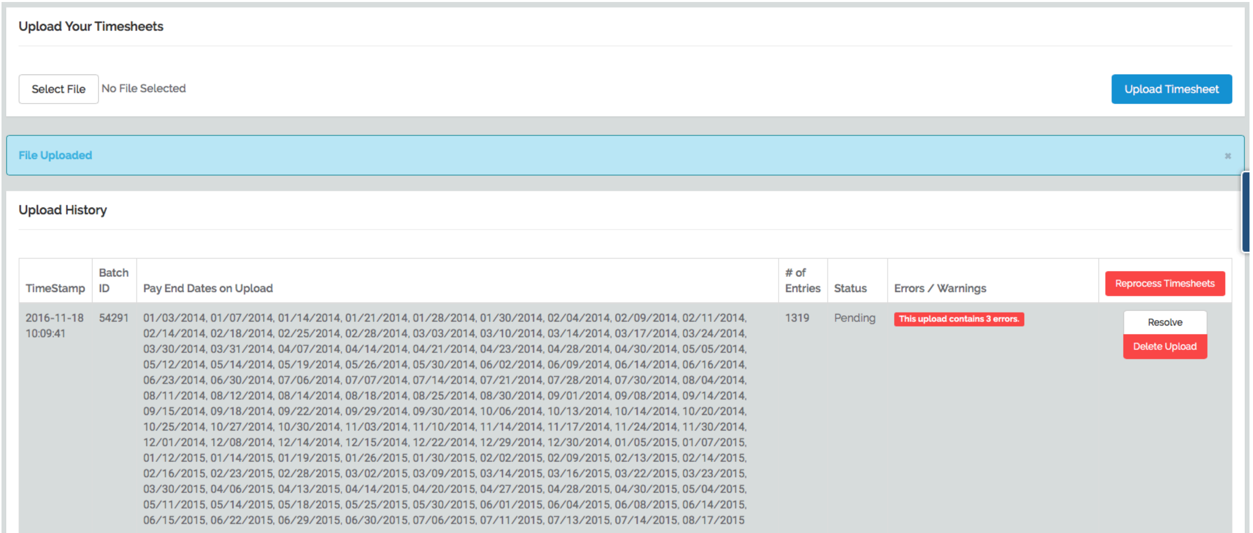
If you would prefer to amend your discrepancies through Worxtime, click the gray "Resolve" button beside your first discrepancy. Once you have clicked "Resolve," you will be taken to the Resolve Employee Discrepancy page. A list of discrepancies for this employee will be listed in red at the top of the page. All discrepancies must be manually resolved on this page. Once the discrepancies have been amended, scroll to the bottom of the page. You will find a section entitled "Note changes." You can enter notes here if you like to keep track of changes made to your employees or discrepancies resolved for the employee. These notes will be stored in the Employee's Profile.

After you click the "Save" button, you will be taken back to the Employee Uploads page. When all of the discrepancies have been resolved, the employee will be automatically imported into your Worxtime database.

Timesheet Discrepancies

If you are directly uploading a Timesheet file and it contains discrepancies, you will see the red discrepancy message in Upload History. The red message will indicate how many discrepancies appear on the file. If you have received a Discrepancy Email Notification saying you have errors on your Timesheets Upload, log into Worxtime, click on the Timesheets drop-down under the left navigation menu, then click on Upload Timesheets into Worxtime to see the errors.

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

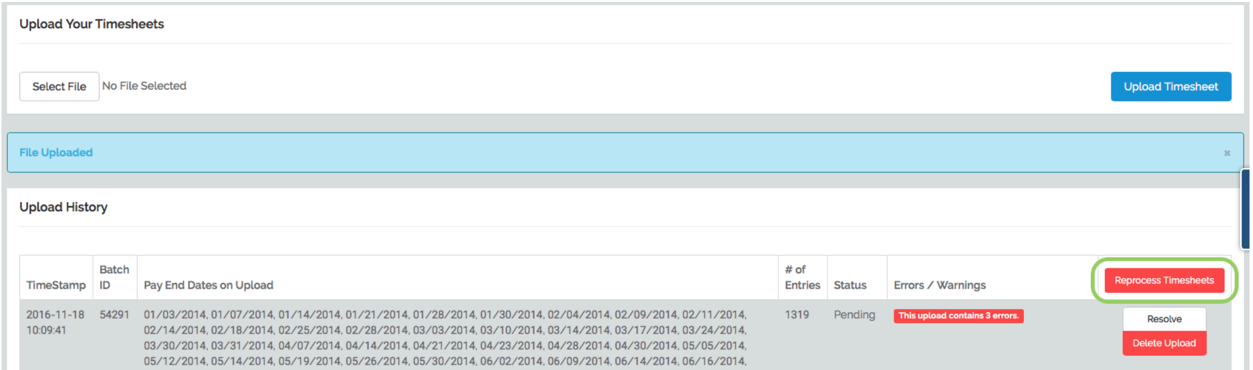


You can review each error(s) by clicking on the white "Resolve" button in the last column. After you have clicked "Resolve," you will be taken to the Resolve Timesheet Discrepancy page. On this page, you will see the name of the employee and their Social Security Number, along with the discrepancy for this individual on the file. Unlike the Employee Demographic file, all discrepancies on the Timesheet file must be resolved before any of the data is imported.

The discrepancy "EIN not found" is the most commonly populated on Timesheet files. "EIN not found" indicates that there is no employee in the database whose Social Security Number matches that of the individual on the Timesheet upload. Typically, these employees are new hires who have not been imported on an Employee Demographic file.

You may add the employee on the Employee Demographic file and reupload it, or add the employee into your database manually by opening the "Employees" drop-down menu and then clicking on "Add a New Employee." After the employee has been added into the database, the discrepancy must be cleared. You can either "Resolve" through the Resolve Timesheet Discrepancy page, or you may click on the "Reprocess Timesheets" button (pictured below) on the Resolve Timesheet Discrepancy page. The Reprocess Timesheets button will only attempt to find a matching SSN for employees with EIN Not Found errors and clear them if it finds a matching SSN. All other errors must be resolved manually or deleted, resolved in the data file, and re-uploaded.

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



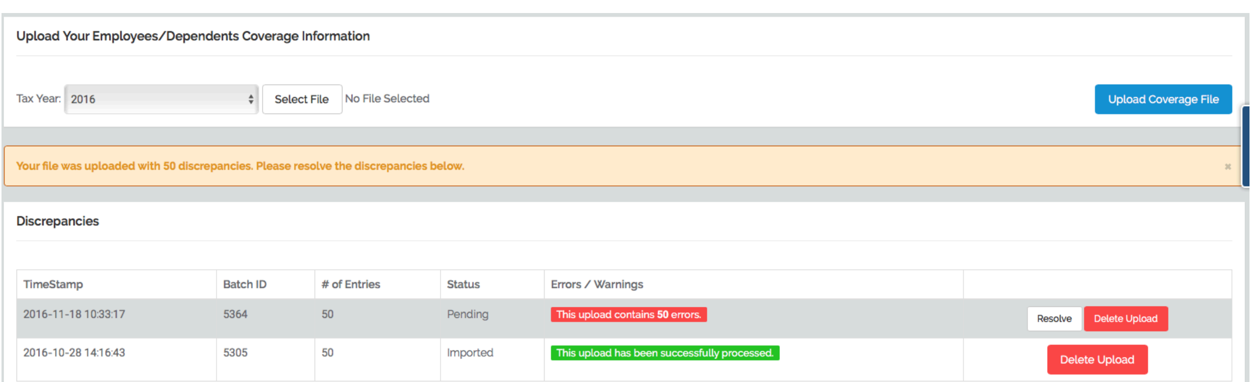
To resolve your Timesheet errors individually, click “Resolve” next to each discrepancy. In the case of “EIN Not Found” you will simply click the blue “Update” button after you have imported the employee correctly into the database. The employee should no longer appear on the Resolve Timesheet Discrepancy page.

Sometimes, you may find that a Timesheet File has been uploaded more than once. This could be a browser error or an issue with your internet connection. This is referred to as a duplicated Timesheet. Duplicated Timesheets can be spotted by checking the Pay Period End Dates on the uploads, along with the number of entries. If the files contain the same Pay Period End dates and the same number of entries, your Timesheet has probably been uploaded more than once.

Delete the duplicated file by clicking the red “Delete Upload” button beside the file you wish to remove. This will remove the duplicated Timesheet from the system. If you do not see the red “Delete Upload” button, please contact Client Services and ask them to delete the duplicated Timesheet.

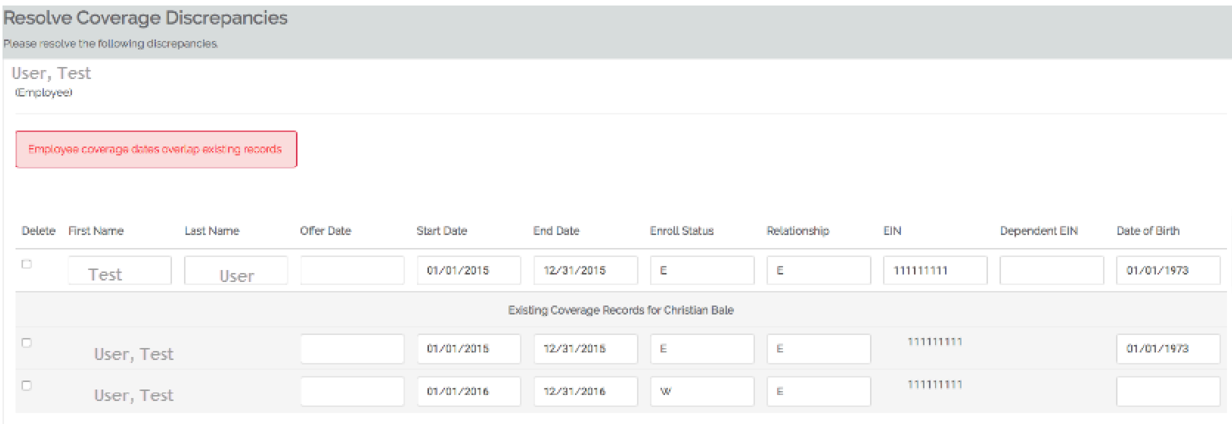
Coverage File Discrepancies

If you have uploaded a Coverage file that contains discrepancies, you will see the applicable red banner under Errors/Warnings. This red error message will indicate how many discrepancies appear on the file.



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

To examine the exact discrepancies you have received, click on the gray “Resolve” button next to the uploaded file. You will be taken to the Resolve Coverage Discrepancy page. On this page, you will be able to see the discrepancies and edit the uploaded coverage information. Browse through each individual discrepancy and make adjustments before clicking the blue “Update” button at the bottom of the screen.



If you see a discrepancy stating “Coverage Dates Overlap,” we already have a coverage record for that employee or dependent during the entered timeframe. Click the checkmark next to the record with the error and click the blue “Update” button. The duplicated coverage record will be deleted.

General Discrepancies

Invalid – [field name] is invalid.
Required – [field name] is a required field.
Unknown – An unknown [field name] discrepancy occurred.
Numeric – [field name] must be numeric.
Max – [field name] exceeds the maximum allowed value [max].

File Processing Discrepancies

A system error occurred while processing your file. Please contact an Administrator.

This appears to be a duplicate timesheet, please verify and try again. Your coverage file appears to be a duplicate upload.

Employee file contains duplicate employee records. Please check your file and try uploading once the duplicate records have been removed.

Employee Demographic file already in queue for this company. A previously uploaded file for this company has discrepancies that must be cleared prior to loading another file.

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Invalid column count. Please check your columns and data mapping and try again. The file failed to load. Please contact an administrator.

Invalid or Empty Company FEIN detected. Please make sure you are uploading this file in the proper company.

Employee Upload Discrepancies
Effective Date
A change of Employee Type was detected but no effective status date was provided.
A change of Employee Group was detected but no effective status date was provided.
A change of Measurement Group was detected but no effective status date was provided.
A change of Pay Period was detected but no effective status date was provided.
Effective status date is before the original hire date.
Status changes cannot occur after a termination date.

Employment History
Employment history is invalid, unable to process records.
Change to original hire date detected, history records prior to this date will be removed.
Rehire date cannot be on the same day as a term date.
No term date found, cannot add a rehire date.
Rehire date cannot be equal to the original hire date.
Rehire date cannot be less than the original hire date.
Rehire date cannot be processed without a prior termination date.
Term date cannot be before hire date.
A term date is required before a rehire date.
Rehire date must be after the term date.

EIN
EIN/SSN is invalid. Must be a 9 digit numeric value.
EIN/SSN is invalid. Starting digits cannot be [000|666].
EIN/SSN is invalid. Middle digits cannot be [00].
EIN/SSN is invalid. Last 4 cannot be [0000].

Dates
[date name] cannot have a 2 digit year.
Invalid format for [date name] [date name] out of acceptable range.

Coverage Upload Discrepancies
Coverage start date and end date begin prior to the tax year.
Coverage start date and end date begin after the tax year.
Coverage start date must be before the end date.
Dependent/Spouse requires TIN/SSN or Date of Birth.
Relationship must be an E or EC for Employee, S or SC for Spouse, or D or DC for Dependent.
Enroll Status must be an E for Enrolled or a W for Waived.
Coverage dates overlap existing records.
Coverage dates overlap in file.

Timesheet Discrepancies
Hours after the term date, resolve to accept.
Pay Period End Date must be after the date of hire.

Discrepancies FAQ

Purpose/Summary:
All your pressing discrepancy questions, answered.

Details:

A few common issues can sometimes arise when clients begin direct uploading their own files. The questions that we receive most often have been answered below for your convenience. If you find that you still have questions regarding your files, feel free to e-mail Client Services at clientservices@worxtime.com.

Question and Answers about General Formatting
Q: The system has given me an error stating I have an Invalid Field name, but my name looks the same. What should I do?
A: Your data may have spaces after the letters or numbers in at least one cell. The automated fix depends heavily upon your version of Excel and the type of computer you have. The TRIM function, properly utilized on your spreadsheet, should remove the trailing spaces. Once those have been removed, reload the file.

Q: The system has given me an error stating that my field must be numeric. What should I do?
A: Commas have been found in a place where they were not expected. Commas are often instinctively placed in the Hours File when entering large numbers such as Annual Salary. Please remove the commas from your data and reload. Example: $1,000.00 should be 1000.00.

Q: What is the correct naming convention?
A: Recommended file naming convention is as follows for EE Uploads, HRS Uploads, and Cov Uploads in that order:

- EE_Upload_(Client Assigned ID)_(Pay Period End Date)_(Date File Created).csv
- HRS_Upload_(Client Assigned ID)_(Pay Period End Date)_(Date File Created).csv
- Cov_Upload_(Client Assigned ID)_(Coverage Month End Date).csv

Q: One of my employees is named True, Null, or False. How do I input their name properly into the EE, HRS, and Cov files so that they populate?
A: The employee name must be surrounded by quotation marks. It will look like this: “True”, “Null”, or “False”.

Q: The system has given me an error stating invalid file format or invalid number of columns. What should I do?
A: Use the Data Mapping tool, found under My Company to compare your file to what the system is expecting. If your file has extra columns, it will show in the data mapping tool. The extra columns will need to be removed for the file to load. To remove the extra columns, highlight about 10-15 columns after the last column you want in your file and right click and choose delete.

Question and Answers about Employee Demographic Files
Q: The system has informed me that there are Duplicate Records. What should I do?
A: This means that there are multiple occurrences of an employee (or their social security number) on the Employee Demographic. Unless the two occurrences have different CoFEINs, there can only be one record of an employee on the Employee Demographic. Remove the duplicate occurrences from the upload and reload the file.

Q: I have employees whose addresses are in Puerto Rico. How do I enter their addresses in the EE Upload?
A: Put the street address in Column H. Put the city in Column J. Leave the State in Column K blank. Use the Country Code RQ in Column L. Put the zip code in Column N. Please note that not all zip codes in Puerto Rico are five numbers long; that is fine. Enter it as it appears.

Timesheet Files
Q: I received a discrepancy telling me that there were “hours after termination” for an employee. What should I do?
A: This is a warning rather than a true discrepancy. It is a warning message telling you that in the Hours File, an employee is listed as having worked hours 30 or more days after the termination date listed in the Worxtime system. To correct, look at the employee and look at the hours being uploaded. If the hours are just the final paycheck and need to be uploaded, click “Resolve” and then “Update” to clear the flag. If the employee has not been terminated, or has been rehired then remove the termination date from the Worxtime system (under the Employees tab) and then come back to the Timesheets area, click the “Resolve” and then “Update” to clear the flag.

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

Q: The system gave me a discrepancy that says the Annual Salary Must Be Numeric, the Hourly Rate Must Be Numeric, or the PP Earnings Must Be Numeric. What should I do?
A: On the HRS Upload, you have included characters that are not numbers on columns I, J, and/or K. Please remove any characters that are not numbers. You cannot have letters or symbols in these columns. Decimals, however, are fine. Remove these and reload the file.

Q: The system is telling me that one of my employees has an invalid EIN. What does this mean and what should I do?
A: The Invalid EIN error means the SSN for that employee has not been found in the Worxtime system. First, double check the SSN to make sure it is correct. If the SSN is correct and the employee has been entered into the Worxtime system, double check the SSN that was entered into the Worxtime system. If the employee has not been entered into the Worxtime system, they will need to be added. Employees can be added into the Worxtime system either through manually entering them or by uploading an Employee Demographic file with the employee added.

Question and Answers aboutCoverage Files
Q: The system has notified me that my Coverage Date Format is incorrect. What is the correct Coverage Date Format?
A: Coverage Date Format must always be listed as mm/dd/yyyy. Change the Coverage Date Format and reload the file.

Q: The system has notified me that I have overlapping coverage dates. How do I correct this?
A: Click on resolve. The system will show what is currently in the system and what dates the uploaded files have on it. From here, either correct the dates to no longer overlap or click delete on the record that needs to be removed.

Q: The Audit Wizard is telling me that some of my employees were not offered coverage, but I'm sure that I offered them coverage. How do I fix this?
A: The Coverage File tells Worxtime which employees have been offered coverage, and whether they have been enrolled or waived. Worxtime tracks employee hours to determine when an employee should be offered coverage. If the coverage file dates differ from Worxtime, this is when you will see the employee name on the “benefit eligible but not offered coverage” report. If an employee is not on the Coverage file, but they have passed the date by which they should have been offered coverage, the system will automatically flag this employee and let you know that they should have been offered coverage.

To see if the missing employee is on the coverage file, click on the drop down menu labeled "Compliance" on the left navigation menu. Then click on the button labeled "Coverage Records." You will be taken to a new page called "Coverage Records." Use the search box at the top of this page to look for the missing employee or dependent. You only need to populate one of the search fields to look for the employee or dependent.

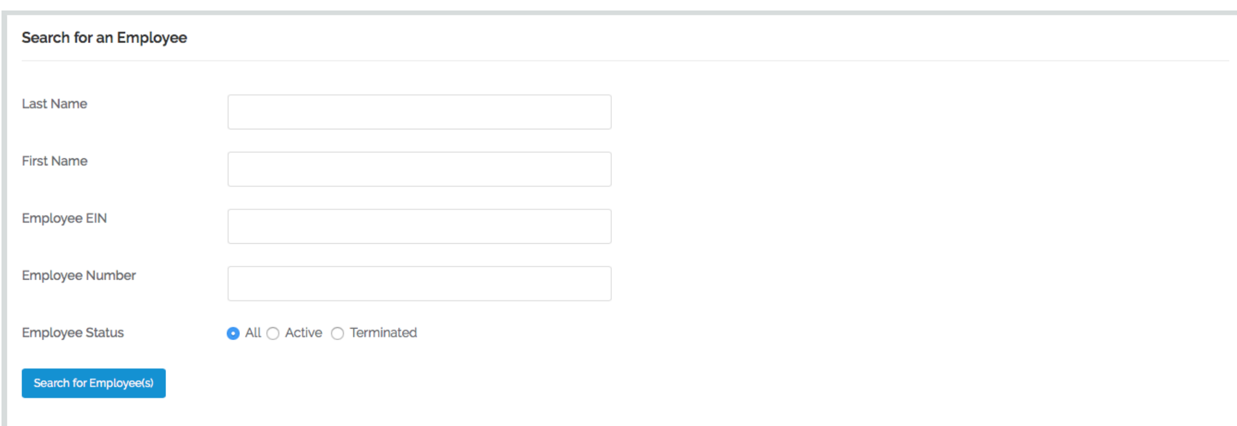
If the employee does not appear when you search for them, the employee is not on the coverage file. If your records indicate coverage was offered, this is an easy fix! Simply create a new .csv Coverage Upload with only the missing employees on it. You do not need to include any employees already in the system. Direct Upload that new coverage file to add the missing employees to the system. Alternatively, you can click on "Add a New Coverage Record" under "Compliance" on the left navigation menu. If your records indicate coverage was not offered but should have been, the employee will remain on this report as not offered coverage.

How do I find an employee?

Purpose/Summary:
Learn how to search for specific employees within the Worxtime system.

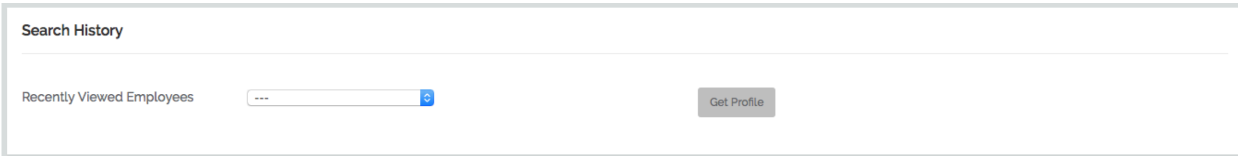
Details:

To search for an employee, open the Employees drop-down under the left navigation menu and click "Employees."

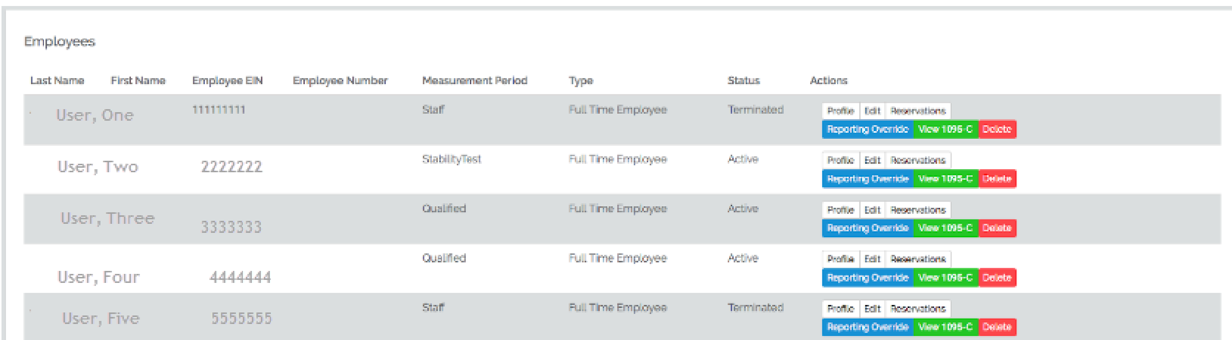


You will be taken to the Search for an Employee page. Here, you can search for employees by their First Name, Last Name, Employee EIN (SSN), Employee Number, or Status. You do not need to fill in all of the fields to search for the employee. Typically, it is best to search for an employee by their EIN (SSN).

The drop-down menu under Search History allows you to quickly select recently viewed employees.



Alternatively, you can scroll to the bottom of the search page to view the full list of your imported employees.



Listed information will include the employee's First Name, Last Name, EIN (SSN), Employee Number, Measurement Period, Type, Status, and a list of Actions.

"Profile" will take you to the employee's profile, which will be discussed in a later section.
"Edit" will take you to the "Edit Employee" screen where you can edit the employee's demographic information. If you edit an employee, please be sure that the corrected information for the employee is included on all future Employee Demographic files, as the new Employee Demographic will overwrite pre-existing information.

"Reservations" allows you to forecast hours in the future for your employees and estimate eligibility.

"Reporting Override" will allow you to manually override the 1095-C codes for this specific employee.

"View 1095-C" will allow you to view the individual's 1095-C form.

If no employees appear after you click "Search for Employee(s)," the system cannot find an employee that meets your search criteria. Please try searching via another method.

If a duplicated employee appears and must be deleted, please contact Client Services.

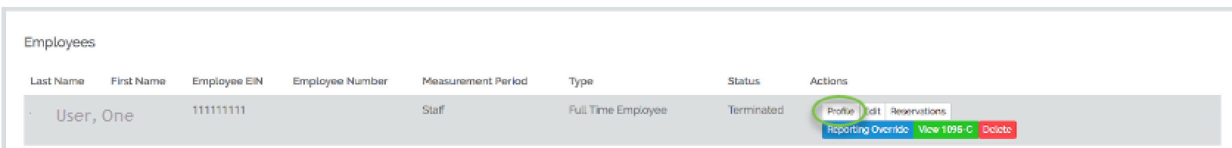
Images are examples and for information purposes only. They may vary across platforms and are subject to change.

What is the Employee Profile?

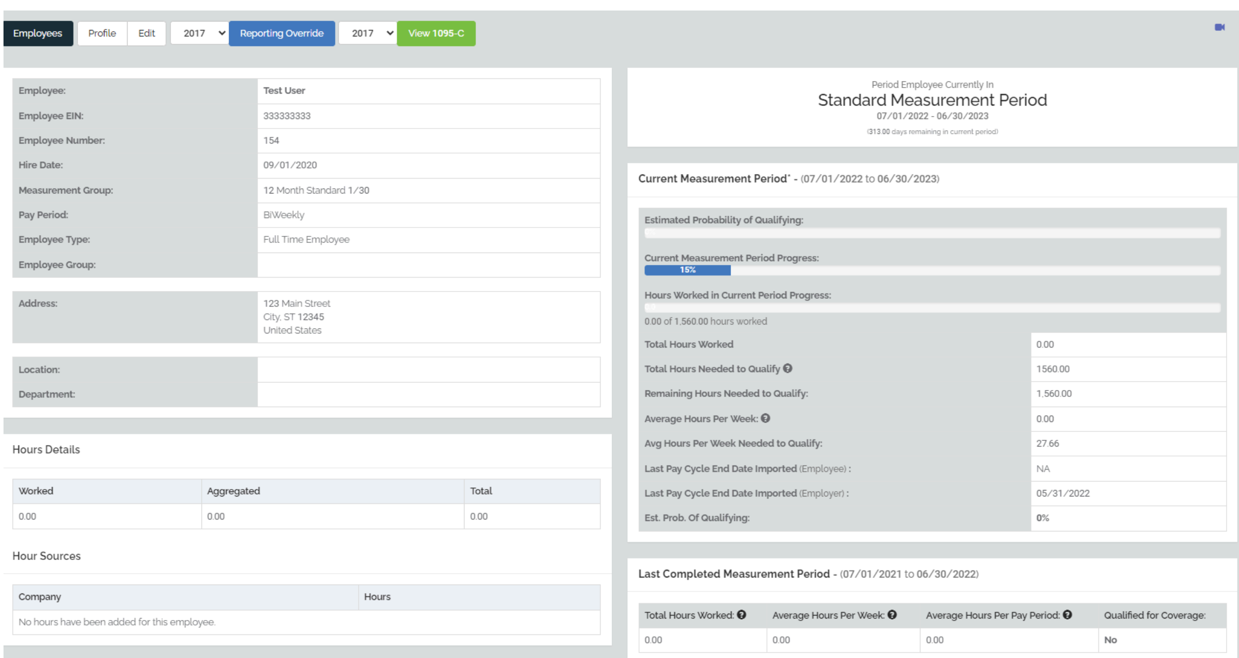
Purpose/Summary:
Learn what the Employee Profile is and how it can help you.

Details:

The Employee Profile is a record of an employee's demographic information, timesheets, coverage information, and employment history. To access an employee's profile, open the "Employees" drop-down menu under the left navigation menu and click on "Employees." Search for the employee whose profile you wish to view and click on "Profile," under Actions.



This will take you to the employee's profile, where you will see the same list of actions displayed on the Search for Employees page at the top of the Employee Profile screen. Beneath the actions, you will see some identifying information like the Employee Name; Employee Number; Hire Date(s); Termination Date(s); the employee's Measurement Group assignment and Pay Period assignment; the Employee Type; the Employee Group (for educational institutions); the employee's Address; and information for any Custom Reporting Fields you may have created.



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The upper right-hand corner of the page will display information regarding the employee's current period, including the type of period the employee is in, how long the employee will remain in that period, the estimated probability of qualifying, the number of hours worked, the number of hours in reserve, the average number of hours worked per week, the last pay end cycle date imported for the employee, the remaining hours needed to qualify, and the average number of hours the employee must work per week to qualify.

Initial Measurement Period means that this employee is a relatively new hire, who has not completed at least one Standard Measurement Period with your company.

Initial Admin Period means that the new hire qualified during their Initial Measurement Period and you are required, per the Affordable Care Act, to make a qualifying offer of health coverage to them.

Initial Stability Period means that the new hire qualified during their Initial Measurement Period, elected or waived offered coverage during their Initial Admin Period, and their eligibility status is currently locked in until the end of the Initial Stability Period.
Hours Worked: The total number of hours this employee has worked in the current measurement period.

Hours Reserved: The number of hours reserved in your hours reserved forecasting tool for this employee. To reserve hours, click on "Reservations" at the top of the screen, above the Employee Name.

Average Hours Per Week: The average number of hours per week your employee is currently working. The system counts the number of weeks from the start of the measurement period through today's date. It then applies that against the total hours worked, and comes up with the average for the employee over that period of time.

Average Hours Per Pay Period: The average number of hours your employee is working per pay period during the current measurement period.

Last Pay Cycle Date Imported (Employee): The last pay cycle that was imported for this employee.

Last Pay Cycle Date Imported (Employer): The last pay cycle that was imported for this company.

Remaining Hours Needed to Qualify: The number of hours the employee has left to work in the current measurement period to qualify for an ACA-mandated offer of coverage.

Avg Hours Per Week Needed to Qualify: The average number of hours this employee needs to work per week throughout the remainder of the measurement period to qualify for an ACA-mandated offer of coverage.

Est. Prob. Of Qualifying: The employee's estimated probability of qualifying for an ACA-mandated offer of coverage.

Below this, you will see information regarding the last completed measurement period, including the dates the last period spanned, the total number of hours worked in the last period, and whether or not the employee qualified for coverage during the last measurement period.

Last Completed Measurement Period - (11/01/2015 to 10/31/2016)

Total Hours Worked:	Average Hours Per Week:	Average Hours Per Pay Period:	Qualified for Coverage:
1,756.00	33.00	67.00	Yes

Total Hours Worked records how many hours this employee worked in the previous completed measurement period.

Qualified for Coverage tells you whether or not the employee qualified for an ACA-mandated offer of health insurance during the last completed measurement period.

Hire dates, termination dates, and rehire dates will be listed in chronological order in the first section of Employment History, beneath “Hire Date” and “Term Date.”

Changes to the employee’s Employee Type (variable hour to full time or vice versa) will be displayed in chronological order under Employee Type.

Changes to the employee’s Measurement Group will be displayed in chronological order under the Measurement Group.

Changes to the employee’s assigned pay period schedule will be displayed in chronological order under Pay Frequency.

Changes to the employee’s assigned Employee Group will be listed in chronological order under Employee Group.

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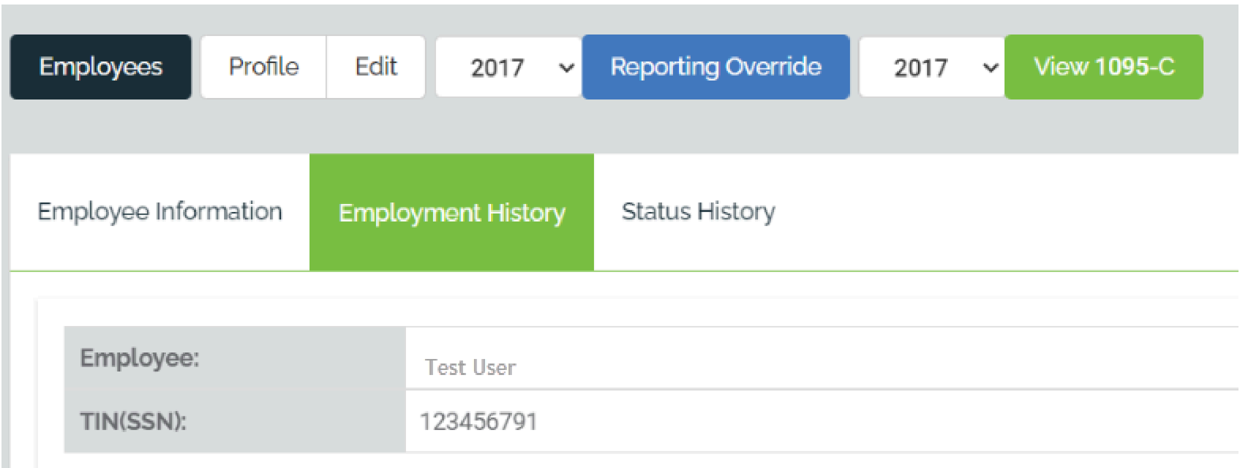
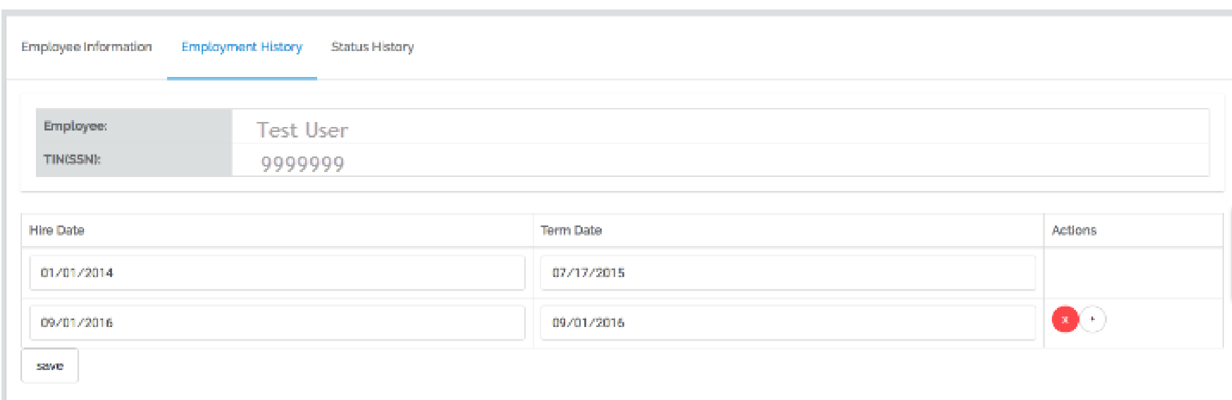
Editing original hire, rehire and termination dates

To edit original hire, rehire, and termination dates, click the “Edit” button at the top of the employee’s profile. You will notice two additional tabs at the top of the Edit page. Click the “Employment History” tab.



The Employment History tab will direct you to a list of the current hire and termination dates in the system for the selected employee.



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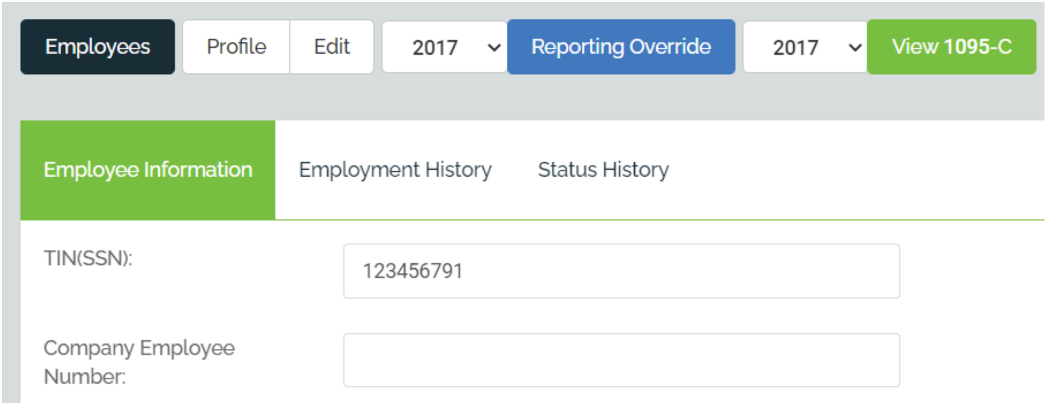
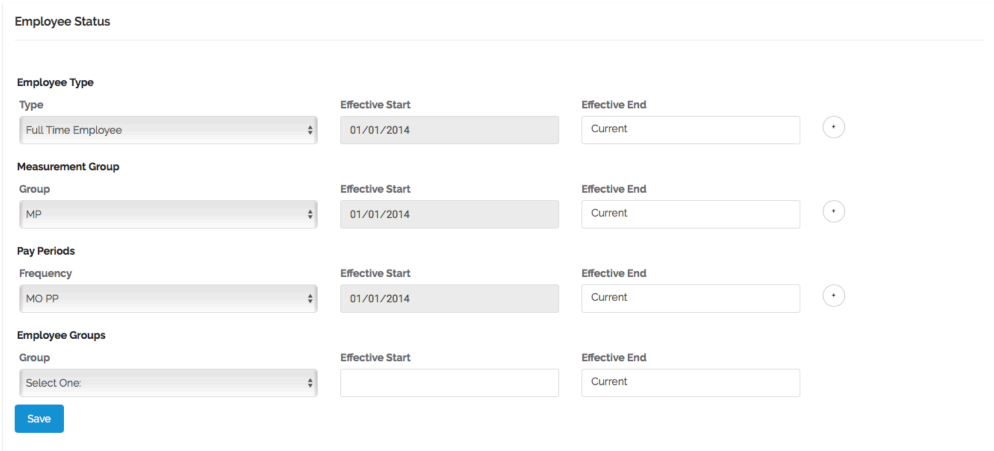
Clicking on any date will allow you to edit it. Clicking on the red “X” under Actions will delete the most recently entered date. Please note that the dates must be entered in order with the oldest date (the original hire date) at the top and the most recent date at the bottom. To edit Employee Status History, click on the “Edit” button at the top of the employee’s profile and then click on the “Status History” tab.



The Status History tab will redirect you to a list of editable employee status histories, including Employee Type, Measurement Group, Pay Period Schedule, and Employee Group.



You can use this menu to add to and change the history of various employee status changes. After you have finished making additions or adjustments to the history of employee status changes, click on the blue “Save” button at the bottom of the page to lock your alterations.

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

Employee's Measurement, Administrative, and Stability period

Information regarding the employee's Measurement, Administrative, and Stability period dates is listed below Employment History, including whether or not the employee qualified for coverage during that period. This section is called Employee Dates.

Employee Dates

Period Type	Measurement Period	Admin Period	Stability Period	Qualified for Coverage
Initial	05/19/2013 - 05/18/2014			No
Standard	05/01/2014 - 04/30/2015	05/01/2015 - 06/30/2015	07/01/2015 - 06/30/2016	Yes
Standard	05/01/2015 - 04/30/2016			No
Standard	05/01/2016 - 04/30/2017			No

All coverage record data that has been uploaded for this employee will be listed after the Employee Dates section, in Employee Coverage Data. Dependent data, if it has been uploaded for this employee, will be listed here as well. Coverage records are created from uploaded coverage files, or from coverage records being manually keyed under the Compliance section.

Employee Coverage Records

Name	Offer Date	Start Date	End Date	Relationship	Enroll Status
Test User		01/01/2015	12/31/2015	Employee	Enrolled

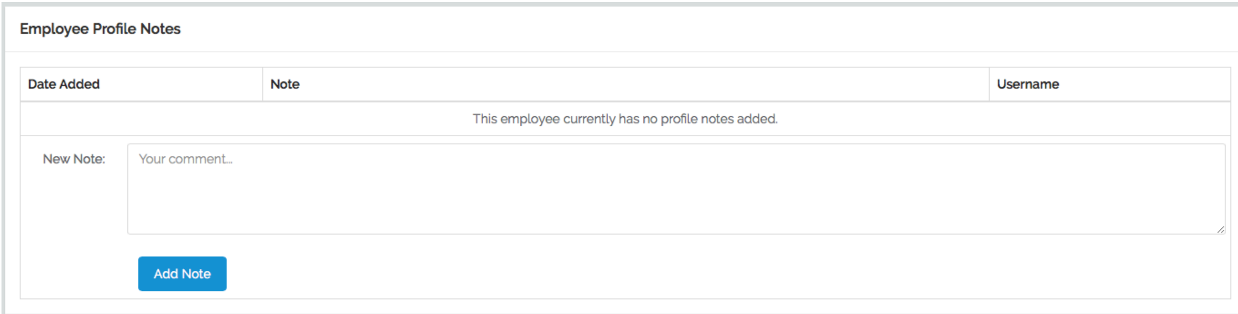
The next section, Hours Reported, details each pay period, hours worked, and monetary earnings entries for the employee. Please note that pay period earnings, hourly rate, and annual salary are not required fields on the Worxtime templates. If this information is not provided at the time the file is uploaded, it will not display on the employee's profile.

Hours Reported

Pay Period Date	Hours Worked	Pay Period Earnings	Hourly Rate	Annual Salary
07/13/2015	104.00	6500.00		50000.00
06/22/2015	104.00	6500.00		50000.00
06/01/2015	104.00	6500.00		50000.00
05/11/2015	104.00	6500.00		50000.00
04/20/2015	104.00	6500.00		50000.00
03/30/2015	32.00	6500.00		50000.00

Any notes that have been made when editing the employee's profile, correcting discrepancies or manually entering data will be listed in the last section of the Employee Profile, under Employee Profile Notes and Employee Timesheet notes.

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



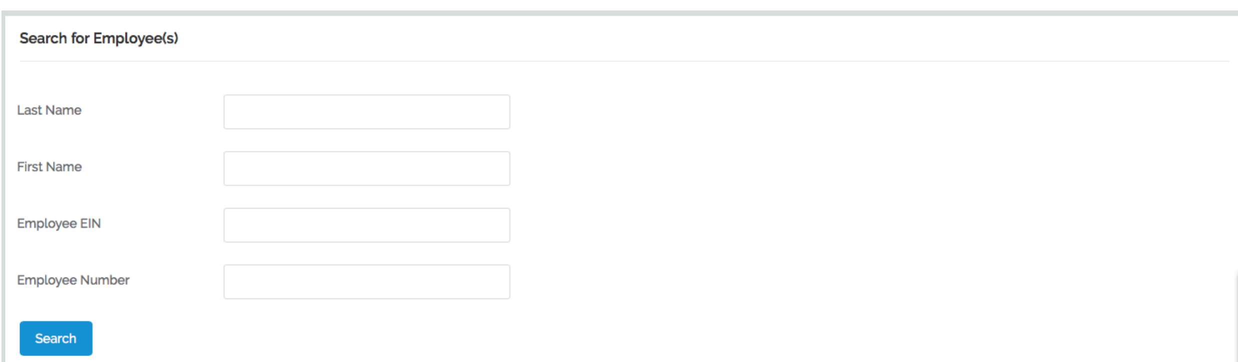
You can use the final field under “Add New Employee Profile Note” to add a note on this employee’s profile.

How do I edit timesheet entries?

Purpose/Summary:
Learn how to easily edit timesheet entries in Worxtime.

Details:

If you need to view or edit hours that have been entered on timesheets for your employees, open the Timesheets drop-down under the left navigation menu and click on the “Timesheets” button. You will be taken to the Timesheets page. Here, you will be able to search for the employee whose timesheet(s) you need to examine. Employees can be searched by their First Name, Last Name, EIN (SSN), or Employee Number. Typically, it is best to search for an employee with their EIN (SSN).



After you have entered the necessary information to search for your employee, click “Search for Employee.” Please note that entering no information and clicking on “Search for Employee” will populate all employee timesheets in Worxtime. After you have clicked search, you will see your results below. Information displayed immediately includes the employee’s name, EIN (SSN), Measurement Period, Employee Number, and a list of actions.

Employees

Last name	First name	Employee EIN	Employee Number	Measurement Period	Actions
User	One	11111111	0001	12 Month Standard 1/30	Edit/View Hours Profile
User	Two	22222222		12 Month Test	Edit/View Hours Profile
User	Three	3333333333	0003	12 Month Standard 1/30	Edit/View Hours Profile
User	Four	444444444	0004	12 Month Standard 1/30	Edit/View Hours Profile

Under “Actions,” you will be able to view or edit an individual employee’s hours. To view or edit the employee’s hours, click the “Edit/View Hours” button. You will be taken to the Employee Timesheet Entries page. On this page, you will see all timesheet entries for the employee. On the left side of the page, you will see the Pay Period End Date and Hours Worked. All pay periods listed will be only the pay periods that this employee has hours uploaded for. If pay periods are missing, there are no hours in your Worxtime database for this employee during that pay period.

If you need to edit Timesheet entries, find the Pay Period End Date that contains the hours which need to be edited. Make the proper adjustments in the Hours Worked field, which is editable. After you have made your changes, click on the blue “Save Entries” button at the bottom of the page. Saving entries will take you back to the Timesheets page.

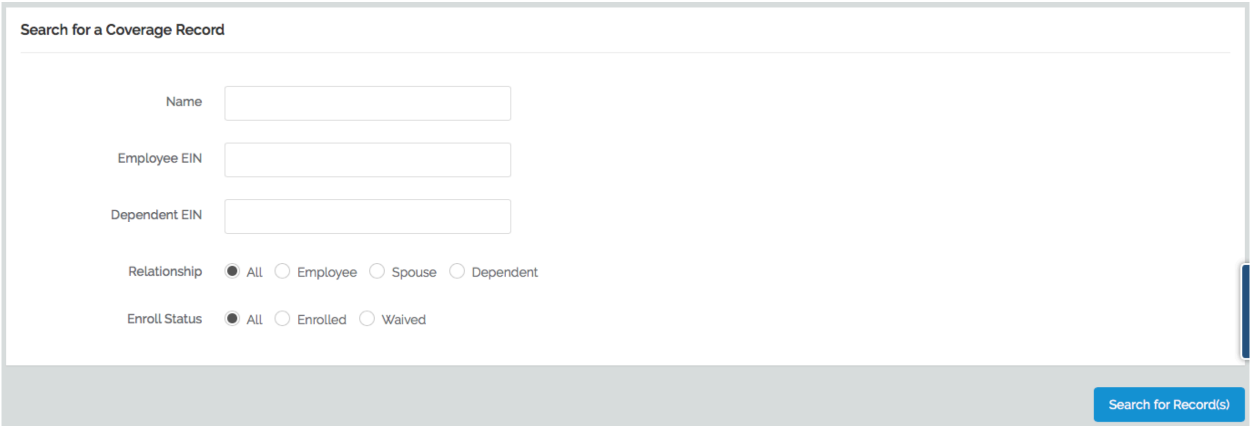
How do I edit coverage records?

Purpose/Summary:
Learn how to add and/or edit coverage records.

Details:

If you need to view or edit existing coverage records, click on “Coverage Records” under the Compliance drop-down. You will be redirected to the Coverage Records page. At the top of the page, you will be able to search for a coverage record. Coverage records can be searched by the name of the covered individual, the EIN (or SSN) of the covered employee, or the EIN (SSN) of the covered dependent. Additionally, you may narrow your search fields by Relationship (Employee/Dependent/All) or Enroll Status (Enrolled/Waived/All).

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

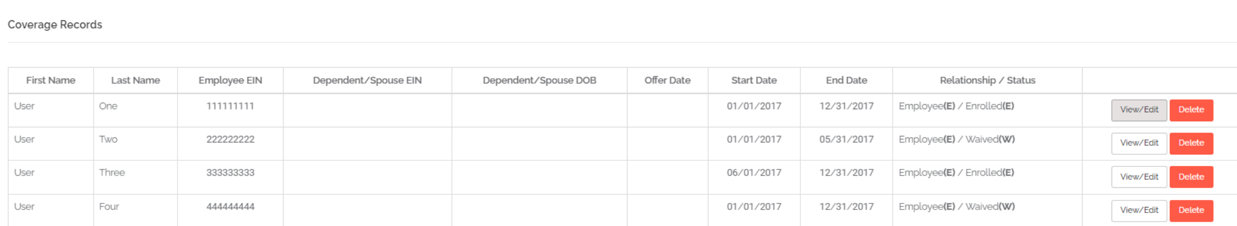


Typically, it is best to search for an employee or dependent with their EIN (SSN). Coverage records are created with an uploaded coverage file or manually entered on the Add a New Coverage Record page.

Please note that clicking on the “Search for Employee(s)” button without entering any information in the search fields will populate all coverage records in your database.

After you click search, a list of all employees and dependents with coverage records that fall within your search parameters will appear. Listed information includes the employee or dependent’s name, the employee EIN, dependent EIN (if applicable), offer date, start date, end date, coverage relationship, and coverage status.

A list of actions on the right will allow you to view/edit or delete each coverage record.

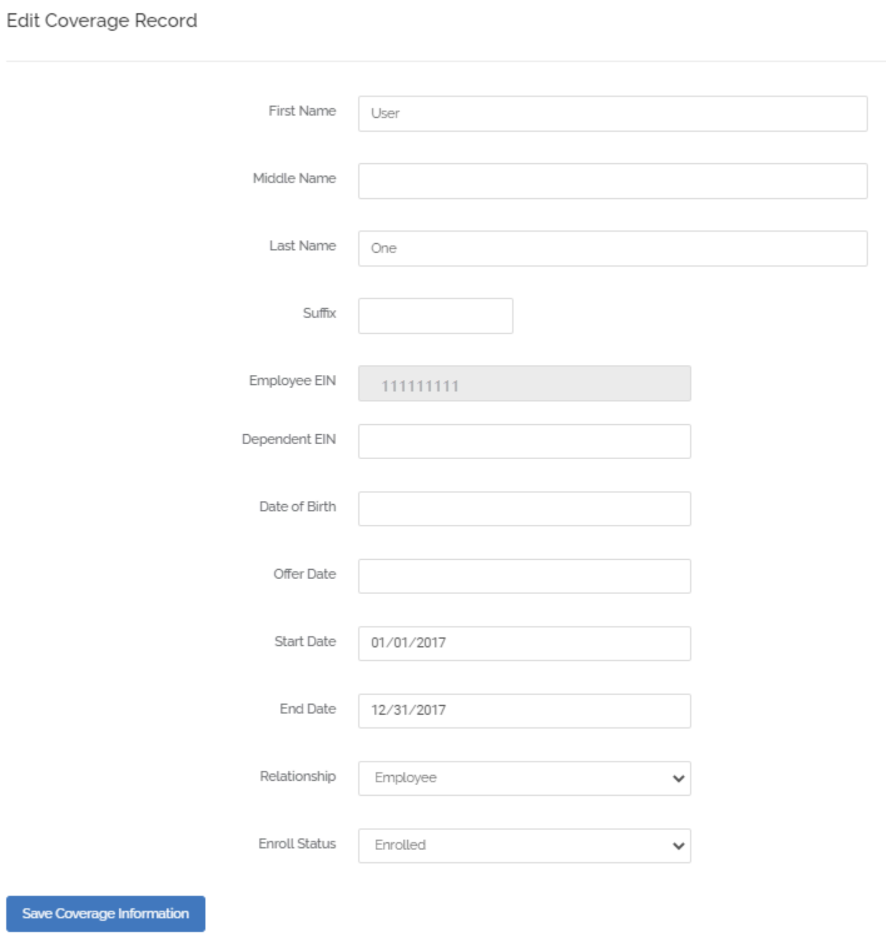


Coverage Records

First Name	Last Name	Employee EIN	Dependent/Spouse EIN	Dependent/Spouse DOB	Offer Date	Start Date	End Date	Relationship / Status	
User	One	111111111				01/01/2017	12/31/2017	Employee**(E)** / Enrolled**(E)**	View/Edit Delete
User	Two	222222222				01/01/2017	05/31/2017	Employee**(E)** / Waived**(W)**	View/Edit Delete
User	Three	333333333				06/01/2017	12/31/2017	Employee**(E)** / Enrolled**(E)**	View/Edit Delete
User	Four	444444444				01/01/2017	12/31/2017	Employee**(E)** / Waived**(W)**	View/Edit Delete

To view or edit the coverage record, click the gray “View/Edit” button under the Actions column. You will arrive on the Coverage Record page. On this page, you can view the individual’s coverage record and make changes to it if necessary. If you adjust any fields, be sure to click the blue “Save Coverage Information” button at the bottom of the page before navigating away.

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



How do I view eligible employees?

Purpose/Summary:
Learn how to review employees who are eligible for health insurance.

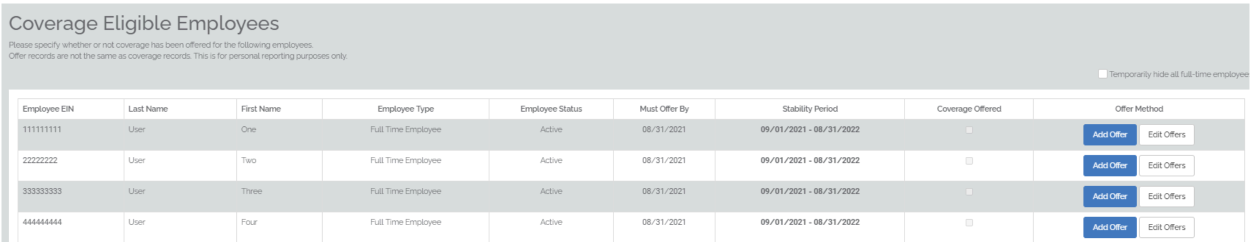
Details:

To view employees who are eligible for an ACA-mandated offer of health insurance coverage, open the Compliance drop-down and click on “Coverage Eligible Employees.”

You will be redirected to a list of employees who are currently eligible for ACA-mandated offers of qualifying health insurance coverage.

On the right side of the screen, across from the employee’s identifying information, you will be presented with the “Add Offer” and “Edit Offers” options. Next to each employee, you will see the

“Must Offer By” date. Each employee must be offered coverage by the specified date, or you may be assessed for a penalty per the Affordable Care Act. Click the blue “Add Offer” button to input a record for personal use for the eligible employee. This is a quick and easy way to keep track of your offers of insurance coverage throughout the year.



Clicking “Add Offer” will populate a box where you can enter the offer date, start date, end date, and enrollment status of the offer. Please note that entering a coverage record here via Add Offer will NOT import a coverage record into Worxtime. You must upload coverage records on Coverage Files, or input them manually via “Add a New Coverage Record.” Coverage Eligible Employees is for your personal tracking information only.

Use the “Edit Offers” button to edit offers of coverage you are tracking on the Coverage Eligible Employees page.

How do I view full-time new hires who are eligible for coverage?

Purpose/Summary:
Learn how to view which full-time new hires are eligible for coverage.

Details:

To view full-time new hires who are eligible for an ACA-mandated offer of qualifying health insurance, open the “Compliance” drop-down and click on “Full-Time New Hire Eligible Employees.” You will be redirected to the Full-Time New Hire Eligible Employees page. This page will only list the full-time new hires who are eligible for coverage within their initial 90 days of being employed with your company. This page is for your own internal use to track new hires who need to be offered coverage.

If you currently have no full-time new hires who are eligible for coverage within their first 90 days, no employees will be displayed.

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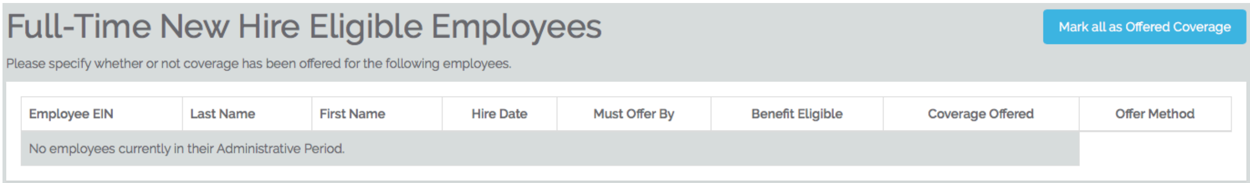


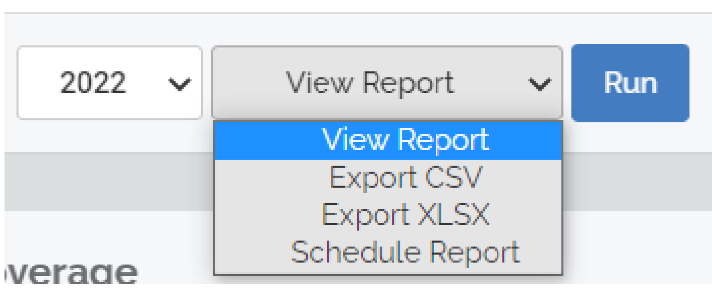
What are the standard Worxtime reports?

Purpose/Summary:
Learn about the standard reports and how to access them.

Details:

To view the Standard Reports created by Worxtime, click on “Reports” under the Reports drop-down.

Here, you will be able to view standard reports in your browser window, export them in Excel formats, or schedule them to be sent to your email address regularly. To view a report in your browser window click on “View Report” beside the report in question. Next section To export a report in an Excel format, select “Export CSV” or “Export XLSX” from the drop-down selection beside the port in question, then click on “Export CSV or Export XLSX.” Next Section To schedule a report to be sent to your email regularly, select “Schedule Report” from the drop-down selection beside the report in question, then click on “Schedule Report.”



Demographic Reports
The first section of your standard Reports is labeled Demographic Reports. Here, you can view, schedule, and export data relating to your employee population.

Your demographic reports include the following:
- Employee Demographic Report: A full extract of all employee demographic data in Worxtime.
- Employee Demographic FTE Report: Full extract of all active full-time employee demographic data in Worxtime..
- Employee Demographic VHE Report: Full extract of all active variable-hour employee demographic data in Worxtime.

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- Employee Address Audit Report: List of all employees within Worxtime that may not meet USPS Address Guidelines.
- Employee Social Audit Report: List of all employees within Worxtime that may not meet IRS TIN Validation Guidelines.
- Dependent Social Audit Report: List of all dependent coverage records within Worxtime that may not meet IRS TIN Validation Guidelines.
- Full-Time New Hires Report: Full extract of all full-time employees that have been hired in the last 90 days.
- Employee Demographic Discrepancies: Full extract of all employees with demographic discrepancies or uploads.
- Employee History Report: Full extract of all Employees and their hire/term dates and status history.
- Employee Historical Demographic Report: Full extract of all Employees and their hire/term dates and status history in an uploadable format.

Timesheet Reports
The second section of your standard Reports is labeled Timesheet Reports. Here, you can view, schedule, and export data relating to the number of hours your employees are working.

- Company Pay Period Entries Report: Total count of all Pay Period entries for all pay periods.
- Employee Total Hours Report: Full extract of all employee hours as stored in Worxtime.
- Monthly Hours Report: Total hours worked per Employee per month for the given time period.
- Employees Average Hours Report: A full extract of all active employees along with their average hours for their current measurement period.
- Timesheet Discrepancies Report: A report of all timesheet discrepancies in the Worxtime System.
- Company Hours Data Extract Report: An extract of Company Timesheet data formatted to match the upload template for HRS files.
- Missing Timesheets Report: A report that lists all missing timesheets.
- Employees with Hours by Month Report: Employee counts by month of employees who have had non-zero hours timesheet records added with pay period end dates in that month.
- Employee Dates Report: Full extract of all employee measurement, admin and stability dates as stored in Worxtime.

Employee Compliance Reports
The third section of your standard Reports is labeled Employee Compliance Reports. Here, you can view, schedule, and export data relating to the state of ACA Compliance in your company.

- Employees Currently in Measurement Period Report: Full extract of all employees information that are currently in a measurement period as stored in Worxtime.
- Employees Currently in Admin Period Report: Full extract of all employees information that are currently in an admin period as stored in Worxtime.

- Employees Currently in Stability Period Report: Full extract of all employees information that are currently in a stability period as stored in Worxtime.
- Employees Last Completed Measurement Period: Full extract of all active employees information related to their last completed measurement period as stored in Worxtime.
- Employees Trending Eligible: Full extract of all employees who are currently trending eligible.
- Employees Trending Ineligible: Full extract of all employees who are currently trending ineligible.
- Employees Trending – Confirmed Eligible: Full extract of all employees who are currently confirmed eligible.
- Employees Who Do Not Qualify for Coverage: Full extract of all active employees who are not eligible for coverage.
- Employees Benefit Eligibility Ending: A list of all employees who had a standard measurement period end and who no longer qualify for coverage after the end of their current stability period.
- Employee Profile: Extract of Employee profile data, including demographic and relevant measurement period information.
- Employees Coverage Records: Full extract of all employees and their dependents coverage records.
- Employees Coverage Discrepancies: Full extract of all employees and their dependents with discrepancies on uploads.

IRS Reports

- Employees 1095-C Codes Report: Full extract of all employees who will receive a 1095-C and their codes for the given year. Use the "Live" option to show codes calculated from the data as it is now in the system. Choose the "Frozen" option to view the most recently "saved" version of the code that is sent to the IRS. Codes are frozen upon completion of the Audit Wizard or when submitting corrections.
- Employees 1095-C Mailer: Full extract of all employees who will receive a 1095-C and their addresses for the given year. Use the "Live" option to show codes calculated from the data as it is now in the system. Choose the "Frozen" option to view the most recently "saved" version of the code that is sent to the IRS. Codes are frozen upon completion of the Audit Wizard or when submitting corrections.
- Company 1094-C Minimum Essential Coverage Report: Breakdown of Percentage of Coverage Offered to Eligible Employees on the 1094-C form for the given year. Use the "Live" option to show codes calculated from the data as it is now in the system. Choose the "Frozen" option to view the most recently "saved" version of the codes that are sent to the IRS. Codes are frozen upon completion of the Audit Wizard or when submitting corrections.
- Employees Eligible But Not Offered Coverage Report: Full extract of all active employees who are eligible for benefits though have not been offered coverage for the year. Those who are eligible but not offered coverage are marked with "X" for a given month (Must have IRS Rule Sets for a given year).
- Employees Offered But Not Eligible for Coverage Report: A list of Employees, broken down by month, who have coverage but are not eligible for that month. Those who are covered but not eligible are marked with an "X" for the given month. May be useful in determining which employees can be removed from coverage.

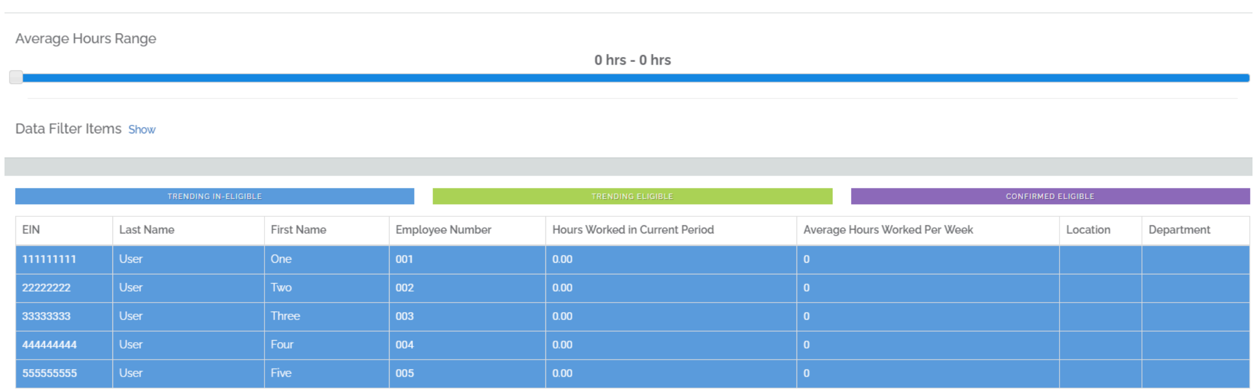
- IRS Submission Errors Report: Full extract of all employee IRS errors for the given tax year, sorted by submission.
- Risk Assessment Report: A report to provide a "risk assessment" to help understand your penalty risk from the IRS.

How do I create custom analytics reports?

Purpose/Summary:
Learn how to create custom analytics reports.

Details:

To create and customize a custom analytics report, click on “Custom Analytics Report” under the “Reports” drop-down on the left navigation menu. The Custom Analytics Report allows you to pull data from your employee demographic utilizing an average hours worked range and your Custom Reporting Fields. You can use the scale bar to set a range for the Average Hours Worked. The drop-down menus under Data Filter Items will allow you to filter data with your Custom Reporting fields.


Average Hours Range
0 hrs - 0 hrs
Data Filter Items Show
TRENDING IN-ELIGIBLE
TRENDING ELIGIBLE
CONFIRMED ELIGIBLE

EIN	Last Name	First Name	Employee Number	Hours Worked in Current Period	Average Hours Worked Per Week	Location	Department
111111111	User	One	001	0.00	0		
22222222	User	Two	002	0.00	0		
33333333	User	Three	003	0.00	0		
444444444	User	Four	004	0.00	0		
555555555	User	Five	005	0.00	0		

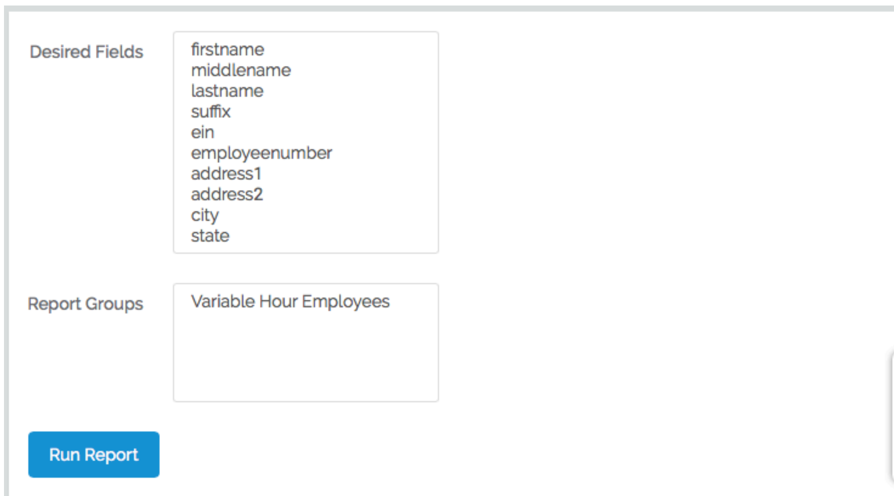
Images are examples and for information purposes only. They may vary across platforms and are subject to change.

How do I use the Advanced Reporting Wizard?

Purpose/Summary:
Learn to use the advanced reporting wizard.

Details:

To utilize the Advanced Reporting Wizard, click on "Advanced Reporting Wizard" under the "Reports" drop-down on the left navigation menu. The Advanced Reporting Wizard allows you to create a custom report using a number of data fields that Worxtime offers.



Select the desired fields from the list. To select multiple fields on a Mac, shift-click or command-click. To select multiple fields on a PC, shift-click or control-click. After you have selected all of the fields you wish to include, click "Run Report."

Once you have run the report, you will be able to export it in Excel formats or schedule it to be sent to your e-mail inbox regularly. The available fields for Advanced Reporting Wizard reports are as follows:

- Firstname – The employee's first name
- Middlename – The employee's middle name
- Lastname – The employee's last name
- Suffix – The employee's suffix
- EIN – The Employer ID Number (CoFEIN, Tax ID, etc) of the company that this employee is employed under
- Employeenumber – Any employee ID number given to the employee on the Employee Demographic
- Address1 – The first line of the employee's address
- Address2 – The second line of the employee's address
- City – The city this employee lives in
- State – The state this employee lives in

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- Country – The country this employee lives in
- Postalcode – The postal code for this employee's address
- Hiredate – This employee's original hire date
- Termdate – This employee's termination date
- Emptypename – This employee's employee type per the Employee Demographic
- Empstatus – This employee's employee status per the Employee Demographic
- Employeegroup_name – This employee's employee group name per the Employee Demographic
- Reportingfield(1-10) – Data from your Custom Reporting Fields if you have chosen any
- Measurementgroupname – The measurement group this employee is assigned
- Payperiodname – The pay period schedule this employee is assigned to
- CMPstartdate – The starting date of this employee's current measurement period
- CMPenddate – The ending date of this employee's current measurement period
- CMPhoursworked – The number of hours this employee has worked in the current measurement period
- CMPhoursreserved – The number of hours reserved for this employee in the current measurement period
- CMPtrending – The trending status (trending eligible or trending ineligible) for this employee
- CMPavghoursperweek – The average number of hours this employee is working per week in the current measurement period
- CMPhoursremaining – The number of hours this employee still needs to work in the current measurement period to be benefit eligible per the ACA
- CMPavghoursremainingperweek – The average number of hours this employee needs to work each week for the remainder of the current measurement period to become benefit eligible per the ACA
- CMPchanceofqualifying – The employee's percentage chance of becoming eligible for benefits per the ACA in the current measurement period
- Hoursinperiod – The number of hours this employee has worked in the current measurement period
- CPstartdate – The start date of the current period, whether it is Measurement, Admin, or Stability
- CPenddate – The end date of the current period, whether it is Measurement, Admin, or Stability
- CPdaysremain – The number of days remaining in the current period, whether it is Measurement, Admin, or Stability
- LCMPstartdate – The start date of the last completed measurement period
- LCMPenddate – The end date of the last completed measurement period
- LCMPhoursworked – The number of hours this employee worked in the last completed measurement period
- LCMPbenefitseligible – The benefit eligibility status of this employee following the last completed measurement period
- Breakinserviceweeks – The length of this employee's break in service (for educational institutions)

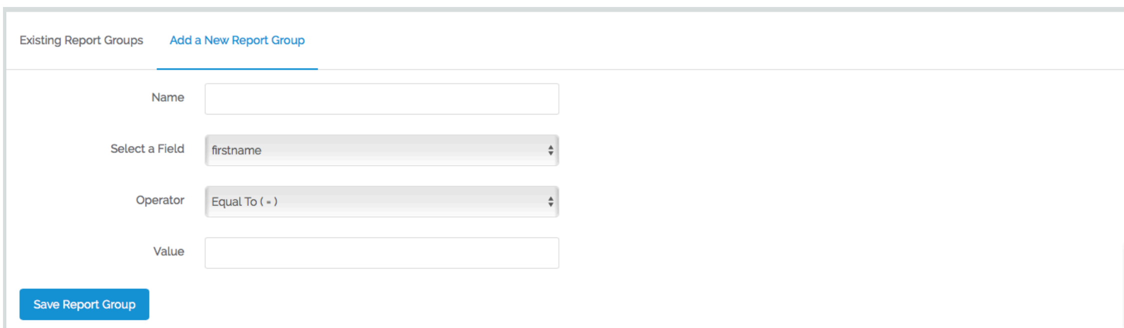
What are Report Groups?

Purpose/Summary:
Learn how to create and edit Report Groups.

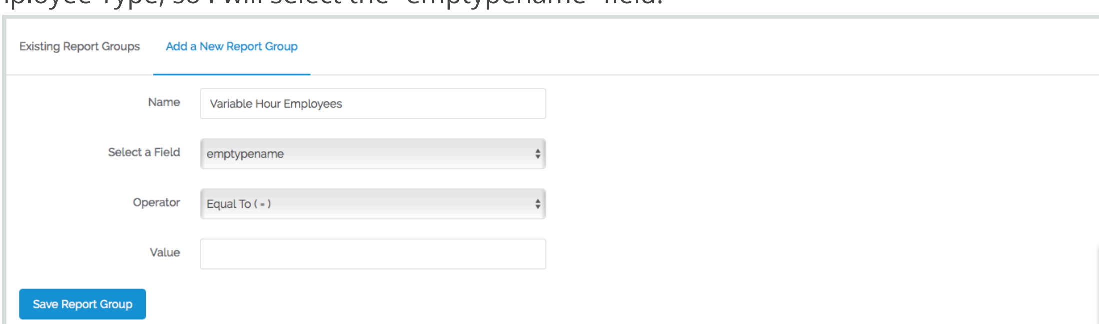
Details:

You do not need to run your Advanced Reporting Wizard reports on your entire employee population. Report Groups function as filters for your customized Advanced Reporting Wizard.

To create and edit Report Groups, click on “Report Groups” under the “Reports” tab on the left navigation menu. You will be taken to the Report Groups page, where you may view your existing Report Groups. To create a new Report Group, click on “Add a New Report Group.” You will be presented with the screen pictured below.



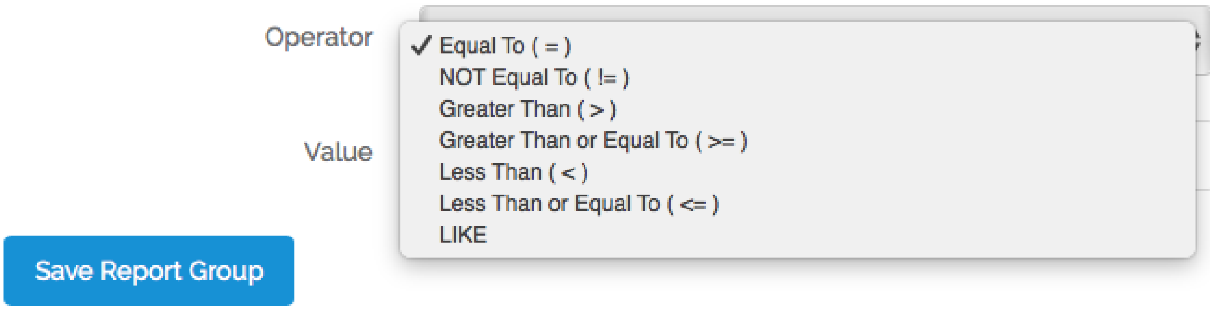
First, choose a name for your Report Group. In our example, I will create a Report Group that filters our Report to only Variable Hour Employees. So, I will name the Report Group “Variable Hour Employees.” Next, select the field you wish to filter by. In our example, Variable Hour Employees is an Employee Type, so I will select the “emptypename” field.



Now, you will need to select the operator for your Report Group. This will tell the Report Group what the filter’s relationship between the Field and Value should be.

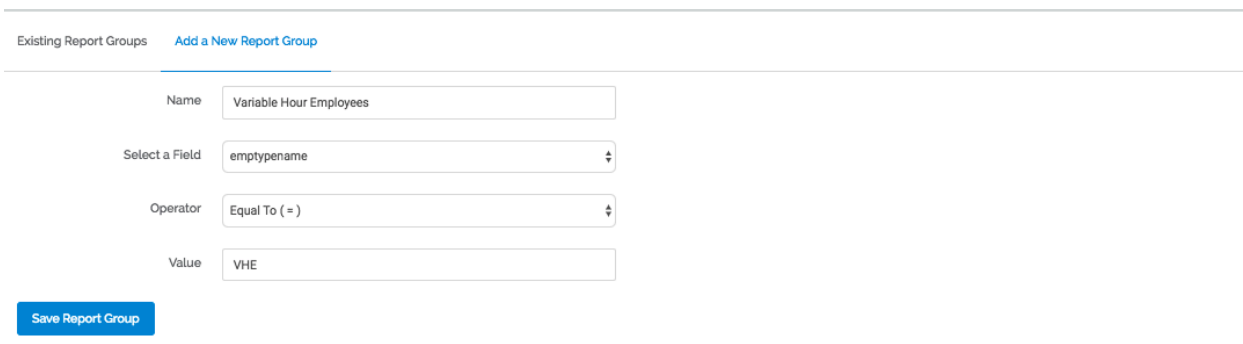
Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Offered operators include:



In our example, we want our Employee Type (the field) to be equal to variable hour employee, so we will select the Equal To (=) operator. Finally, you will input the desired filtering value into the Value field. In our example, we want our Employee Type to be Equal To Variable Hour. So far, we have entered that we want our employee to filter by employee type and that we want it to be equal to some value. Now we need to input the value we want our employee type to equal.

After all of the information has been entered, click on the blue “Save Report Group” button below the information fields.



You will be able to view your new Report Group under the View Existing Report Groups tab.

Additionally, your Report Group will appear under “Report Groups” on the Advanced Audit Wizard page. Select the Report Group you wish to filter by with your fields when you build a custom report. You can create and use as many Report Groups as you like.

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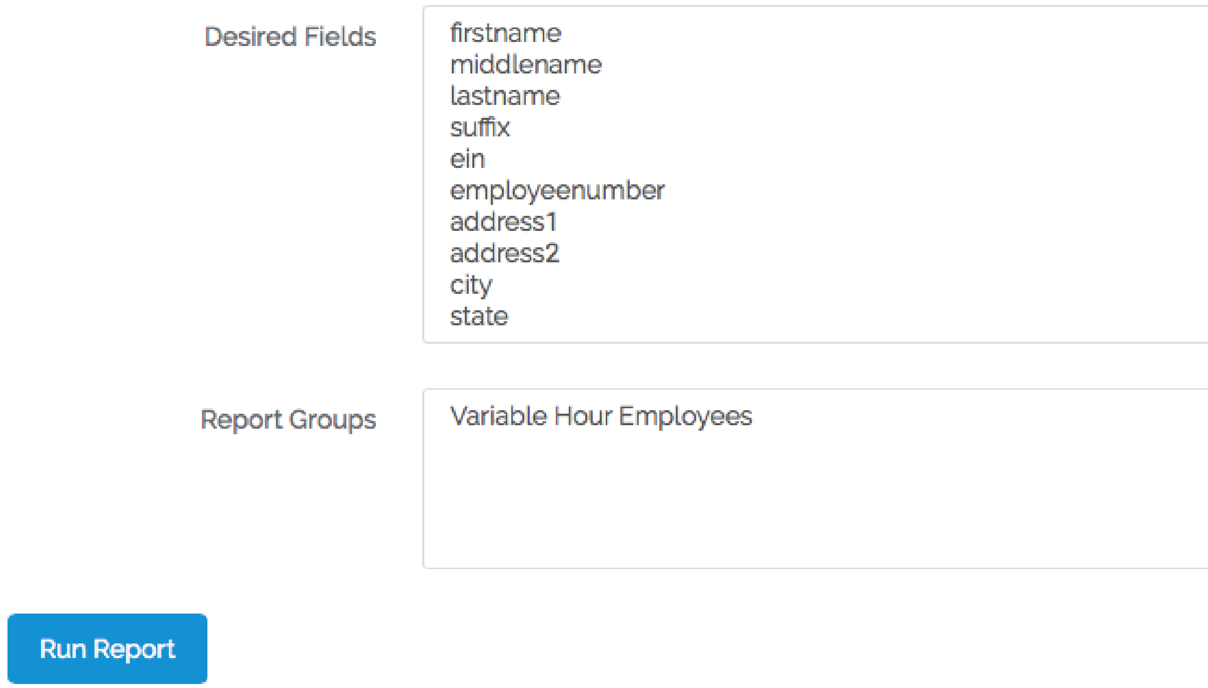
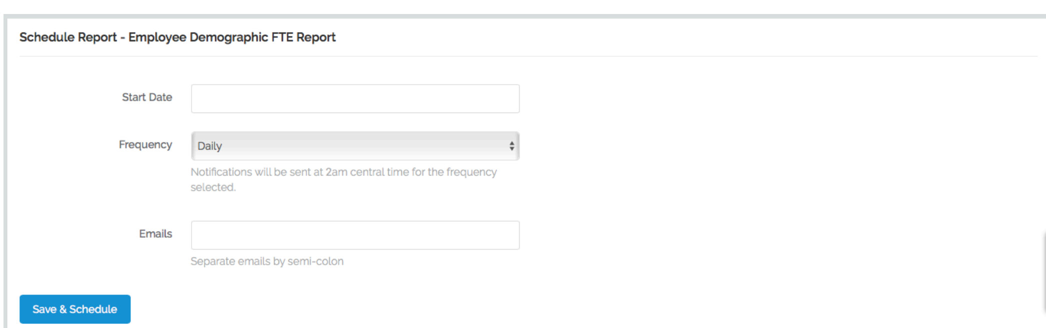


How do I schedule reports?

Purpose/Summary:
Learn how to schedule reports.

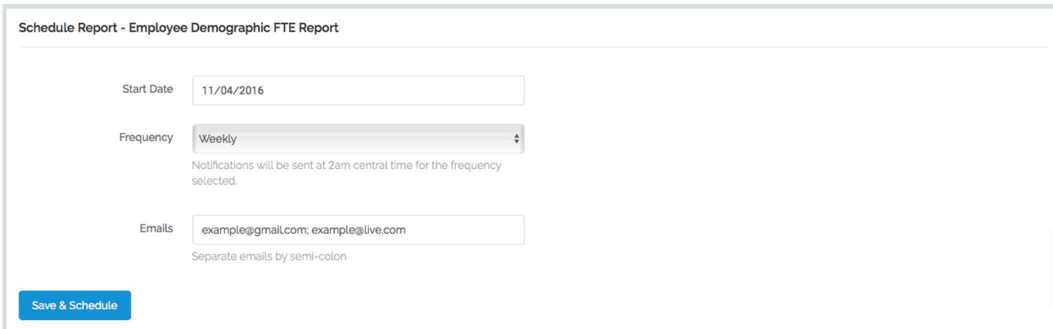
Details:

Any standard or custom report can be scheduled to be e-mailed to you regularly. To schedule a standard report, click on “Reports” in the Reports drop-down menu under the left navigation menu. Find the report you wish to schedule and select “Schedule Report” from the drop-down menu beside it.

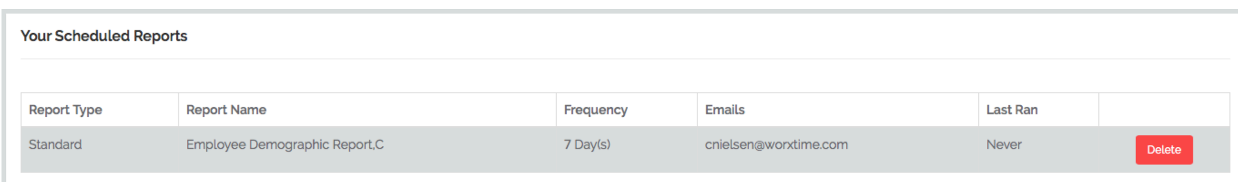


Images are examples and for information purposes only. They may vary across platforms and are subject to change.

The name of the report being scheduled will appear at the top of the page. First, you will select the Start Date. This will be the first day the report is e-mailed to you. Next, you will select the frequency you wish the report to be sent to you on. Worxtime offers daily, weekly, biweekly, and monthly frequencies. Finally, enter the email address(es) that the report should be sent to. You may enter multiple addresses by separating them with a semicolon.



Click the blue "Save & Schedule" button at the bottom of the page. You can edit or delete any of your scheduled reports on the "Your Scheduled Reports" page. Access Your Scheduled Reports by opening the Reports drop-down under Main Navigation and clicking "Scheduled Reports."



How do I set alerts?

Purpose/Summary:
Learn how to set up customized alerts and emails.

Details:

Alerts are a customizable set of automated emails triggered by certain events that may occur in your Worxtime database. You can set alerts to trigger in a number of different situations, like when an employee is no longer eligible for an ACA mandated offer of coverage or when their hours worked exceed a certain threshold in the current measurement period.

You can access Alerts by clicking on "Reports & Alerts" under the left navigation menu, then select "Alerts" from the drop-down menu. You will be taken to the Alerts page, under the View/Edit Existing Alerts tab. Here, you can view, edit, or delete any alerts that are already set up on your Worxtime account. To create a new alert, click on the “Add a New Alert” tab at the top of the page. Use the drop-down menu to select the alert you would like to receive. Worxtime currently offers the following alerts, listed below.

Company Information

- Company Information Changed: This alert will trigger when a change to Company name or EIN is made.

Employee Information

- Employee Terminated: You will receive an automated alert any time an employee’s status is changed to Terminated.
- Employee Uploaded: You will receive an automated alert any time an Employee Demographic file is uploaded, or an employee is entered manually.
- Employee Uploaded with Discrepancies: You will receive an automated alert any time an Employee Demographic file is uploaded with discrepancies.

Employee Profile Information

- Employee Benefit Eligibility Ending Soon (this was previously referred to as Employees Stability Period Ended alert):This event will trigger when an employee is in a stability period and finishes a measurement period but does not qualify for benefits for the following stability period.
- Employees Current Hours Exceed Threshold: You will be able to set a number of hours as the “threshold” and an automated alert will be sent to you when the employee works over the number of hours in the threshold in a single measurement period. This can help you identify employees who are approaching eligibility.
- Employees Entered Admin Period: You will receive an automated alert any time an employee enters an Administrative period. This can help you offer coverage to eligible employees on time.
- Employees Entered Stability Period: You will receive an automated alert any time an employee enters a Stability Period. This can help you know when an employee’s eligibility status has been locked in.
- Employees Probability of Qualifying Exceed Threshold: You will be able to set a percentage threshold and receive an automated alert when an employee’s probability of qualifying for an ACA-mandated offer of coverage exceeds that threshold.
- Employees Qualified for Benefits: You will receive an automated alert any time an employee meets their hours requirement in the current measurement period to qualify for an ACA-mandated offer of coverage.
- Out of Compliance: You will receive an automated alert X amount of days before the end of the administrative period if the organization is out of compliance

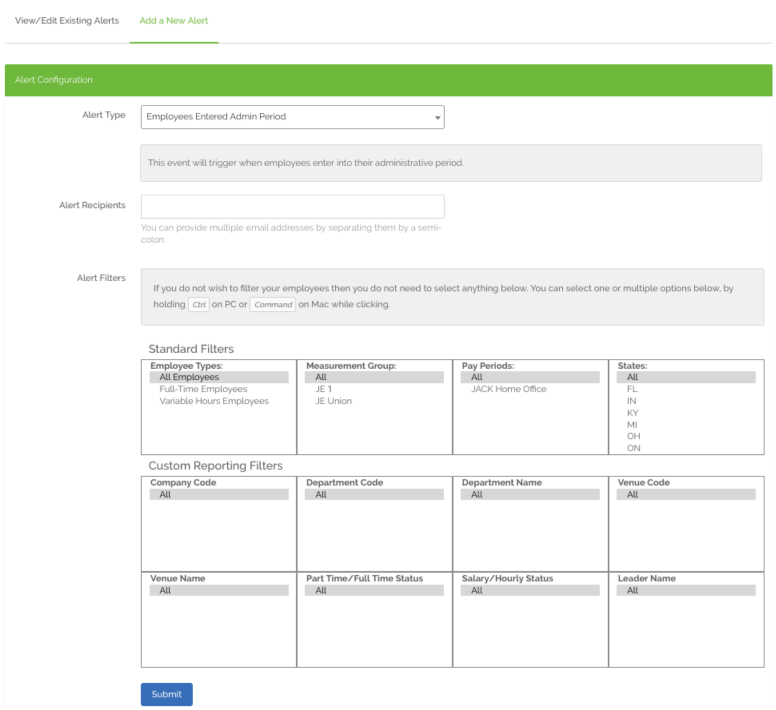
FTP File Information

- Files Uploaded via Worxtime FTP: This alert will trigger when a file has successfully been uploaded via Worxtime FTP for the data team to review and upload.

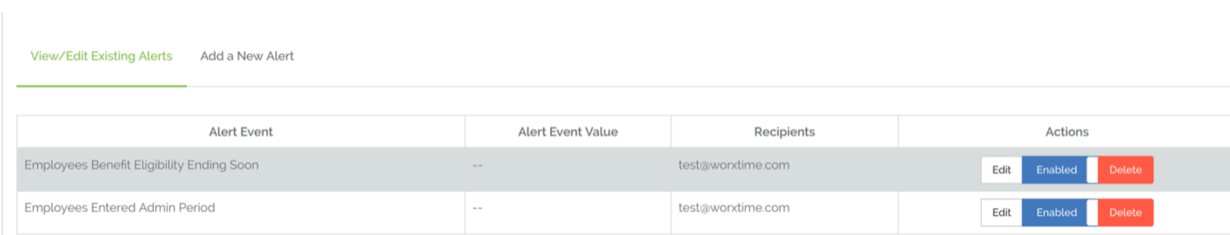
Timesheet Information

- Missing Timesheet: This alert will trigger X amount of days after the conclusion of a pay period and you have not uploaded a timesheet file.
- Timesheet Entry Manually Added: This alert will trigger when a timesheet entry has been manually added.
- Timesheet Uploaded: This alert will trigger when timesheets have been successfully uploaded into Worxtime.
- Timesheet Uploaded with Discrepancies: This alert will trigger if a timesheet file is uploaded with discrepancies that must be resolved.

After you select the alert you wish to enable, you will be able to select filters and change additional settings for each alert. Once your alert settings are ready, you will need to provide an e-mail address for whomever should receive the alert. You can separate multiple e-mail addresses with a semicolon. Click "Submit" at the bottom of the page after the e-mail addresses have been entered.



The alert will now appear under "View/Edit Existing Alerts." If at any time you need to edit, disable, or delete the alert, you may do it from the "View/Edit Existing Alert" screen.



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

Worxtime can recommend alerts to complement the way you use your Worxtime database. Your Account Manager can make personalized recommendations. However, Worxtime recommends that all users utilize the following:

- Employees Entered Admin Period
- Employees Benefit Eligibility Ending Soon

What are 1094/5-C forms?

Purpose/Summary:
Learn about 1095-Cs and 1094s.

Details:

The Affordable Care Act requires employers with at least 50 full-time and full-time equivalent employees to offer eligible employees affordable, minimum essential coverage, minimum essential value health insurance. Each year, Applicable Large Employers must submit tax form 1095-C for those eligible employees. This page provides details about the coverage offered to the employee. Tax form 1094-C functions as a cover sheet for the 1095-C forms you will file, providing basic information about your company and employee demographic counts.

Viewing Your 1094/1095-C Forms
The 1095-C forms will be ready to view once the Audit Wizard is available at the end of the tax year. You can view your forms in several places.

- Under the Certification of the 1095-C tab of the Audit Wizard, use the blue link to access a PDF file containing all of your 1095-C forms in a browser window.
- Click "1094/1095 Reporting" under the Reports drop-down on the left navigation menu to access PDF files containing your 1094-C and 1095-C forms.
- Open the Employees drop-down menu under the left navigation menu and click on Employees. Search for an individual employee and open the Employee Profile. Click on the green "View 1095-C" button at the top of the Employee Profile to see an individual's 1095-C form.

Who Receives a 1095-C Form?

For Employers on Fully Insured Plans
Full-time employees, as defined by the Affordable Care Act, receive a 1095-C form regardless of enrollment status.

Employees who did not qualify as full-time per the Affordable Care Act will not receive a 1095-C, even if they enrolled in the insurance plan. Additionally, employees who terminate employment before the end of their limited non-assessment period will not receive a form.

For Employers on Self Insured Plans

Full-time employees, as defined by the Affordable Care Act, receive a form regardless of enrollment status. Employees who did not qualify as full-time per the Affordable Care Act will also receive a 1095-C form if they enrolled in the insurance plan.

Employees who did not qualify as full-time per the Affordable Care Act, and did not enroll in the insurance plan, will not receive a 1095-C form. Additionally, employees who terminate employment before the end of their limited non-assessment period will not receive a form.

Dependents

Dependent information is only populated on 1095-C forms for companies with a Self Insured Plan. Self Insured employers will need to upload dependent information on their Employee Demographic and Coverage uploads.

1095-C Forms and Codes

600120

Form **1095-C**
Department of the Treasury
Internal Revenue Service

Employer-Provided Health Insurance Offer and Coverage
▶ Do not attach to your tax return. Keep for your records.
▶ Go to *www.irs.gov/Form1095C* for instructions and the latest information.

☐ VOID
☐ CORRECTED

OMB No. 1545-2251
2021

Part I Employee			Applicable Large Employer Member (Employer)		
1 Name of employee (first name, middle initial, last name)		2 Social security number (SSN)	7 Name of employer		8 Employer identification number (EIN)
3 Street address (including apartment no.)			9 Street address (including room or suite no.)		10 Contact telephone number
4 City or town	5 State or province	6 Country and ZIP or foreign postal code	11 City or town	12 State or province	13 Country and ZIP or foreign postal code

Part I of the 1095-C form contains demographic information about the employee and the employer. The employee's full name (first and last; the IRS does not track middle names for these verification purposes) and Social Security Number should match the information on the employee's latest social security card exactly or the 1095-C will be returned with a TIN Validation Error. The employer's information includes the company name, company EIN, company's address, and a telephone number.

Part II Employee Offer of Coverage | **Employee's Age on January 1** | **Plan Start Month** (enter 2-digit number):

	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
14 Offer of Coverage (enter required code)													
15 Employee Required Contribution (see instructions)	$	$	$	$	$	$	$	$	$	$	$	$	$
16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)													
17 ZIP Code													

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 60705M Form **1095-C** (2021)

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

Part II of the 1095-C form contains information about the employee's coverage status for every month of the tax year.

Line 14 and 16 will contain one of a series of indicator codes for each month. Indicator codes are determined by the IRS on a yearly basis. For information about specific indicator codes, please contact Client Services.

Line 15 contains the employee share of the lowest cost monthly premium for self-only minimum value coverage for each month of the tax year.

Line 17 contains the employee's ZIP code.

600320

Form 1095-C (2021) Page 3

Part III Covered Individuals

If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. ☐

	(a) Name of covered individual(s) First name, middle initial, last name	(b) SSN or other TIN	(c) DOB (if SSN or other TIN is not available)	(d) Covered all 12 months	(e) Months of coverage Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
18				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
19				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
20				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
21				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
22				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
23				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
24				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
25				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
26				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
27				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
28				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
29				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
30				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Form **1095-C** (2021)

Part III of the 1095-C form contains information about covered individuals. This section should contain information regarding the employee and, if your company is self-insured, the employee's dependents.

The 1094-C Form

The 1094-C tax form is a summary, or cover page, describing the contents of the 1095-C forms and supplying basic company information to the IRS. The state of compliance, company-wide, and all* of your aggregated groups will be listed in descending order of employee count.

*If your company is included in a group of more than thirty aggregated companies, only the top thirty most populous companies will be listed on the 1094-C.

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

You can view your 1094-C form by opening the Reports drop-down under left navigation menu and clicking on “1094/1095 Reporting.” This will redirect you to the IRS Reporting Page. Click on the 1094-C form to view it.

You may review the 1094-C for accuracy. However, the 1094-C is created using the information that you have certified in your Audit Wizard. If you have any questions about the information on your 1094-C form, please contact Client Services or your Account Manager.

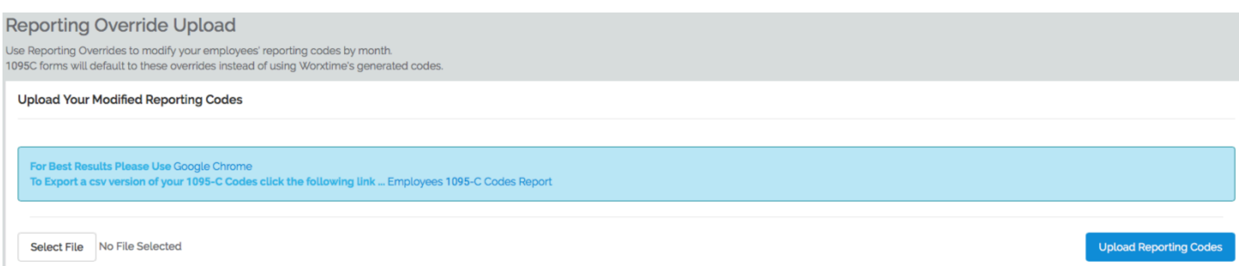
How do I use the Reporting Override Upload?

Purpose/Summary:
Learn about the reporting override upload and how it is used.

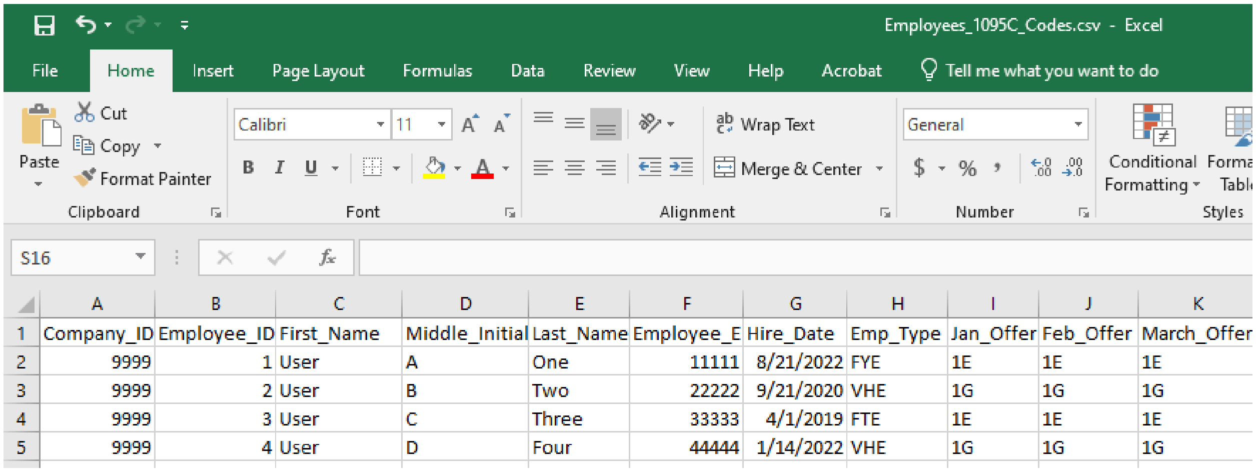
Details:

The Reporting Override Upload can be used to manually change the codes or costs on the 1095-C forms. If everything in the system is displayed correctly but the 1095-C is not producing the correct information, consult with Client Services or your Account Manager to utilize the Reporting Override Upload. Please do not utilize the Reporting Override Upload without consulting a Worxtime Representative.

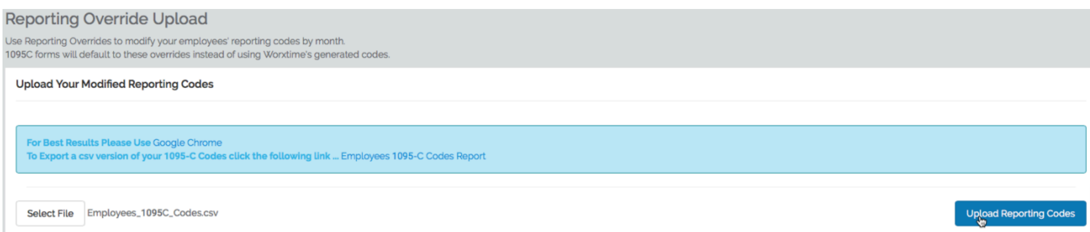
To find the Reporting Override Upload, open the Compliance tab under the left navigation menu and click on “Reporting Override Upload.” You will be taken to the 1095-C Reporting Override Upload page, where you can upload your modified reporting codes. On this page, you will be able to export a .csv Excel file of your current 1095-C codes. Click the “Employees 1095-C Codes Report” link in the blue banner at the top of the page to export your file.



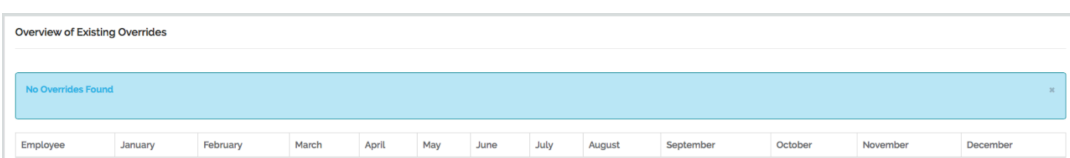
All of the employees who will receive a 1095-C, their 1095-C codes, and the lowest premium for self-only coverage providing minimum value available to them will be listed. Make any necessary corrections, delete everyone on the file who you have made no changes to, and save the file.



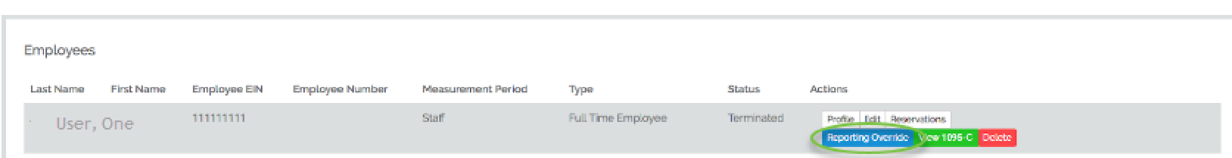
After the file has been saved, you will need to upload it into Worxtime. Return to the 1095-C Reporting Override Upload page. Click on the “Select File” button and select the altered Excel file on your computer. Click on the blue “Upload Reporting File” button.



Please remember to only upload individuals on the file whose 1095-C you have made changes to. Once the file has been uploaded, the edited employees will appear under Overview.

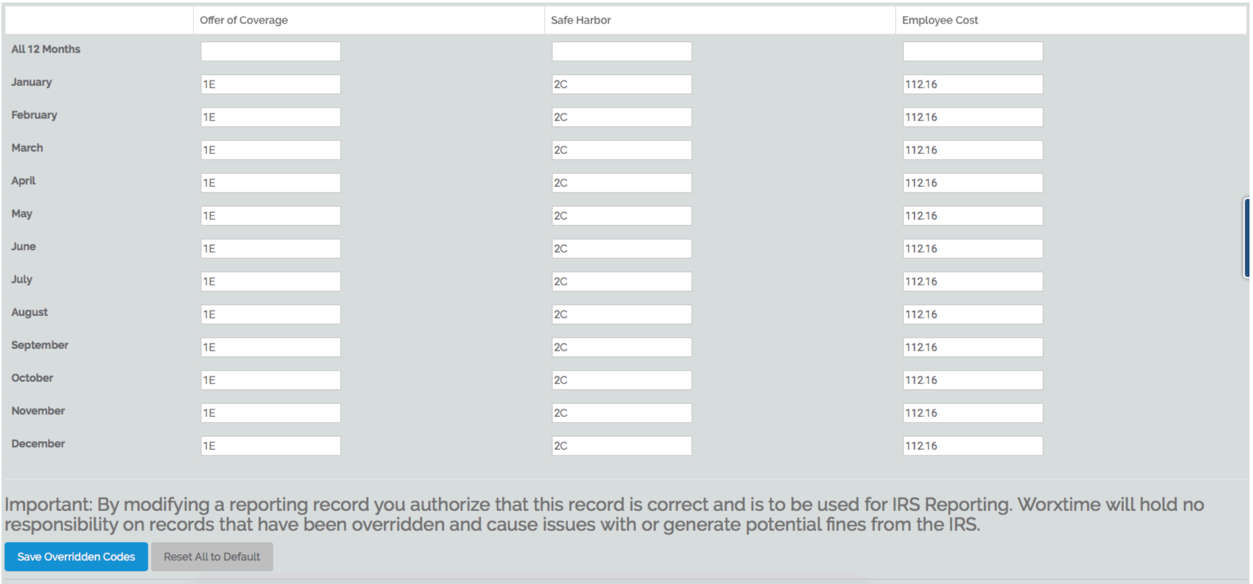


You can override the codes for individual employees as well. Individual overrides can be accomplished through the employee profile. Open the Employees tab on the left navigation menu and click on “Employees.” Search for the employee in question. You can click on the blue Reporting Override button on the search screen, under Actions, or at the top of the Employee Profile page.



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

Clicking on Reporting Override will redirect you to a screen listing the codes on the employee's 1095-C. Here, you can alter the codes for each month. Click on the blue Save button at the bottom of the screen when you have finished your alterations.



	Offer of Coverage	Safe Harbor	Employee Cost
All 12 Months			
January	1E	2C	112.16
February	1E	2C	112.16
March	1E	2C	112.16
April	1E	2C	112.16
May	1E	2C	112.16
June	1E	2C	112.16
July	1E	2C	112.16
August	1E	2C	112.16
September	1E	2C	112.16
October	1E	2C	112.16
November	1E	2C	112.16
December	1E	2C	112.16

Important: By modifying a reporting record you authorize that this record is correct and is to be used for IRS Reporting. Worxtime will hold no responsibility on records that have been overridden and cause issues with or generate potential fines from the IRS.

Save Overridden Codes | Reset All to Default

Please note that modifying a reporting record automatically authorizes that the record is correct and ready to be used for IRS Reporting. Worxtime will hold no responsibility for records that have been overridden and cause issues, or generate potential fines, from the IRS.

What should I expect after filing to the IRS?

Purpose/Summary:
Learn about what happens after you file with the IRS.

Details:

The IRS returns a status regarding every company that has been submitted via e-filing to Worxtime. Clients will receive an update on their dashboard regarding the status of their e-filing.

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

The “Reporting Date” is the date that your e-filing was submitted to the IRS.

The “Type” designates whether the e-filing update is in regards to an Original submission or a Correction.

The “Response Code” is your individual submission key, which identifies your e-filing.

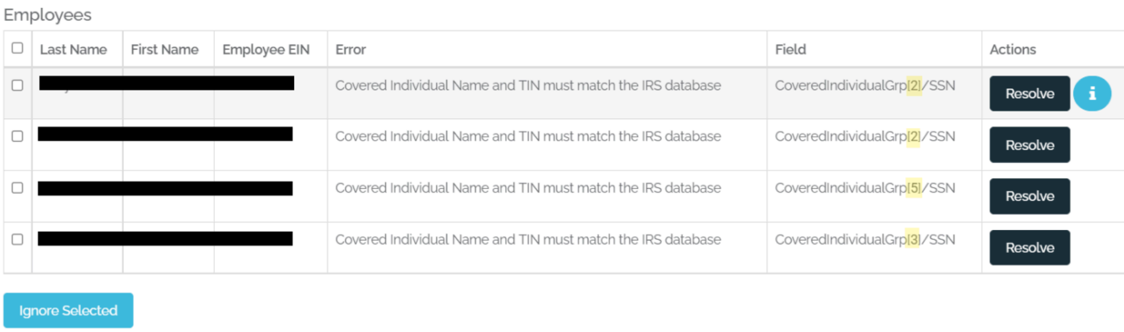
The “Status” field reports the status of your e-filing. Status may be any of the following:

- TBD: Your forms have been submitted but have not been reviewed by the IRS yet.
- Accepted: Your submission was reviewed by the IRS and contained no errors.
- Accepted with Errors: Your submission has been accepted but there are TIN Validation Errors on your filing that need to be addressed.
- Rejected: Your submission was submitted, but there were errors that prevented the submission from being reviewed. Please contact your Account Manager or Client Services to review your submission.

  Note: Worxtime submits company e-filings in large batches called a “transmission.” The “transmission” your company is included on will include a number of other Worxtime clients. The “transmission” status on your Home Page relates to the status of the entire transmission. Your individual “submission” status below the transmission status provides feedback on your individual submission.

To address errors on your e-filing, open the IRS Reporting drop-down under the left navigation menu and click on the tab labeled “IRS Submissions” You will be taken to your IRS Submissions page, where you will be able to see the TIN Validation Errors that the IRS has returned. Below, you will see an example of a TIN Validation Error.

After clicking on Corrections, you will be taken to the Corrections page, which will list all of your employees who were returned with TIN Validation Errors. You can resolve these errors by clicking on “Resolve” beside the employee’s name.



Employees

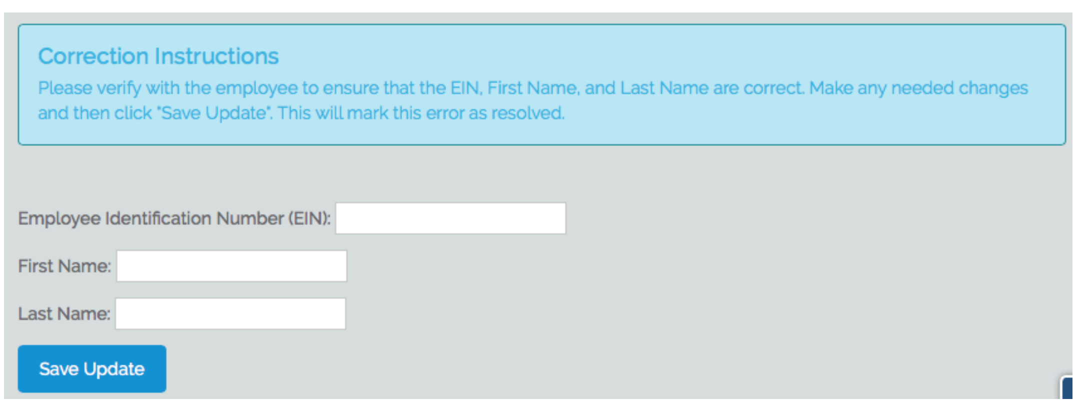
	Last Name	First Name	Employee EIN	Error	Field	Actions
☐	[redacted]			Covered Individual Name and TIN must match the IRS database	CoveredIndividualGrp[2]/SSN	Resolve
☐	[redacted]			Covered Individual Name and TIN must match the IRS database	CoveredIndividualGrp[2]/SSN	Resolve
☐	[redacted]			Covered Individual Name and TIN must match the IRS database	CoveredIndividualGrp[5]/SSN	Resolve
☐	[redacted]			Covered Individual Name and TIN must match the IRS database	CoveredIndividualGrp[3]/SSN	Resolve

Ignore Selected

A TIN Validation error means that either the employee or a dependent name and Social Security Number pairing on the 1095-C does not match IRS records of that individual's name and Social Security Number pairing.

The Field section will indicate if the TIN error is pertaining to the employee or a dependent's information. If the number in brackets is a 1 or the Field lists "EmployeeInfoGrp/SSN," then the error is for the employee. If you see any number in brackets other than a "1," then the error is for a dependent.

For employee TIN errors, make sure that the employee's name and Social Security Number in Worxtime match their most recent social security card and W-2 records exactly. Any discrepancy can cause a TIN Validation error. To correct a TIN error click on the "Resolve" button under the "Actions" column. Clicking on "Resolve" will take you to a list of editable fields for the employee, including EIN (SSN), first name, and last name. The IRS does not use middle names to match names to Social Security Numbers, so the middle name will not need to be corrected.

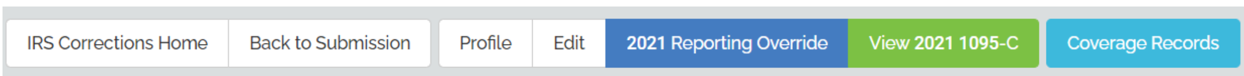


Edit the First Name, Last Name, and/or EIN fields to match the employee's W-2 and social security card records exactly. After you have finished editing the fields, click on the blue "Save Update" button. If you believe that the information is accurate as it was originally entered, you can proceed and click on the blue "Save Update" button without changing any of the data or mark the error as "ignored".

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

To resolve dependent TIN errors, click Resolve in the "Actions" column. On the next page, click the green View 1095-C button at the top of the page. In Part III of the 1095-C form, determine which dependent is in question by matching the number in brackets to the name listed in that line.

Example: If a [2] is present then the dependent listed on the second line in Part III has an issue. Once you've determined which dependent you need to review, go back and click the blue Coverage Records button. Make any necessary changes to the dependent's coverage info for that reporting year by clicking the View/Edit button.



If no changes are necessary, it is acceptable to remove the SSN and leave only the DOB. The IRS will accept a DOB alone as identification for a dependent. However, it is advised that you reach out to the employee in an attempt to obtain the correct information. Once you've made your updates to the dependent's record, return to the Resolve page for the employee and click Mark Resolved.

Please note that Worxtime does not have access to Internal Revenue Service records and cannot confirm social security numbers or names for you. Please contact the Internal Revenue Service if you believe you are receiving TIN Validation errors without cause.

Repeat the process for each TIN Validation error received. After all the TIN Validation errors have been resolved, click return to the IRS Submissions page and click Submit Corrections. Worxtime will then resubmit the e-filing. Contact Client Services or your Account Manager with questions regarding TIN Validation.

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Glossary of Terms

Ad Hoc Reporting Tool: The reporting tool which will allow the user to select only the fields that he/she wants to be included in a report for the entire population.

Add A New Employee: Screen to manually upload an employee who does not currently have a record in the system.

Add A New Timesheet: Screen to manually add in a timesheet entry that was missed or left out previously.

Alerts: Automated email notifications that can be set up to notify those users as requested by the client of certain actions taking place such as employees entering an Admin Period, Employees entering a Stability Period, Employees ending a Stability Period, etc.

Common-Law Employees: Because the contracting companies retain supervisory control over their workers, the Internal Revenue Service considers leased employees as the common-law employees of the company contracting with the PEO. This means the contracting company still has the legal responsibility for complying with such aspects of workforce management as safety regulations and antidiscrimination laws. Companies that contract with a PEO to provide leased employee services should consult with an attorney to determine the exact extent to which they will be liable for the employees. Companies should also be clear with the PEO and within their own management about how to handle contingent workers, also known as independent consultants, who are not considered to be employees of either the PEO or the contracting company.

Company ID Number: Also known as the Case ID, this is an identification number specifically assigned to a company by Worxtime upon company setup in the Worxtime system. You can view this number in the Administrative Toolbox.

Custom Analysis Tools: This is an on screen reporting tool that allows the user to 'slice and dice' the employee population based on hours worked per week as well as any custom reporting fields included by the employer.

Custom Fields: Additional fields that the client includes in uploads which can be used to segregate/differentiate/breakdown the population to do further analysis on specific portions of the organization. These can also be used to restrict users to certain portions of the organization based upon the type of information stored in the custom fields.

Dashboard: This portion of the system shows the current status of hours worked for the entire population of the organization as well as the Employee Type breakdown (Full-time vs. Variable Hour). The dashboard shows the status of hours worked during the current measurement period (top row) and the last completed measurement period (middle row). The dashboard includes ALL employees, both active and terminated, as it is required that we report on all employees that have been active at any point during the measurement period. The dashboard is designed primarily to show which employees are working enough hours to meet full-time or full-time equivalent requirements set forth by ACA.

Employee Demographic Upload: The EE upload within which the employee demographic information is submitted (SSN, name, address, hire date, term date, etc.). This creates the base record for the employee in the system which is required for anyone (even terminated employees) who is active at any point during the measurement period.

Employee Profile: This is the record in the system under the 'Employee' tab which includes a combination of both the EE demographic upload information as well as the hours upload information for each individual employee. This page also provides the measurement/admin/stability period status, hours calculation for the current period, results for last completed measurement period, complete employee history (with respect to all periods completed and results thereof), monthly hours totals and all pay period uploads for each pay period that has been submitted for each individual employee.

Employees Confirmed Eligible: Employees who have NOT completed a measurement period but have already worked enough hours throughout the current measurement period to be considered full-time equivalents.

Employees Trending Eligible: Employees that, during the current measurement period, are averaging 30 or more hours per week.

Employees Trending Ineligible: Employees that, during the current measurement period, are averaging less than 30 hours per week.

Employer Identification Number (EIN): The nine-digit number that is assigned to a company by the IRS, which is used to identify the employer's tax accounts.

Full Time Employee (FTE): Employee who is hired in a position that is historically and continues to be expected to work at least thirty (30) hours per week/130 hours per month. Full-time employees are benefit-eligible just because of their classification and must be offered coverage within ninety (90) days of employment which must be effective no later than day ninety-one (91).

Hours of Service: Each hour for which an employee is paid for the performance of duties for the employer. Also includes each hour for which an employee is paid when no duties are performed such as vacation, holiday, illness, disability, jury duty, military duty, or leave of absence.

Hours Upload (HRS Upload): The HRS upload which provides the number of hours submitted for each employee for each pay period.

Initial Administrative Period (IAP): The period following the IMP during which those employees that are benefit eligible should be offered benefits. The IAP can be up to ninety (90) days except when a twelve (12) month IMP is in place. In that instance, the IAP can last month.

Initial Measurement Period (IMP): The measurement period, equal in time period to the SMP, that begins on the employee's first day of employment.

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

Initial Stability Period (ISP): The period following the IAP during which the employee's insurance coverage is in effect if he/she chooses to accept it. This period will be equal to, in time period, to the Standard Stability Period therefore can be no less than three (3) months and no more than twelve (12) months.

Leased Employee: A leased employee is a worker that is actually employed by a third-party leasing company, but do their work for the company that contracts with the leasing company. This arrangement relieves companies of the administrative responsibilities of managing a workforce, and can also save money by reducing the cost of benefits and insurance.

Legal Name: The company's legal name is the name used for tax filing purposes. The legal name is usually the full name of the person or entity that owns a business. If the business is a partnership, the legal name is generally the combined last names of the two owners. For LLCs, corporations, and limited partnerships, the legal name must be the name of the business as it has been registered with the state filing office.

Minimum Value Standard: Coverage is deemed to meet the minimum value standard if it covers a minimum of 60% of the total allowed cost of benefits expected to be incurred under the plan. For purposes of determining whether an employer's group health plan provides a minimum value of benefits, the plan can utilize a minimum value calculator, a designed-based safe harbor checklist established by HHS/IRS, or the plan can seek an appropriate actuarial certification.

Professional Employer Organization: The company that employs the leased employee is called a "Professional Employer Organization." The PEO handles all the functions that would normally fall under a human resources department such as payroll, tax forms, and benefits. The company that contracts with the PEO supervises the employee.

Report Groups: This tool works in conjunction with the Ad Hoc Reporting tool if the user wants to only pull data on a specific portion of the population (defined by custom field) or if the user is interested in selecting parameters for a more specific report pulling more defined data.

Reports: Standard Reports are listed under the Reports tab. These can be reviewed on screen or exported into .csv or .xlsx format.

Seasonal Employee: An individual who on an annual basis works 6 months or less and is generally employed at the same time each year.

Standard Administrative Period (SAP): The employer selected period during which those employees that are benefit eligible should be offered coverage. The SAP can be no longer than ninety (90) days and will begin immediately following the SMP.

Standard Measurement Period (SMP): The employer-selected measurement period during which employee's time is 'measured' to determine benefit eligibility. The measurement period can be anywhere between 3-12 months depending on the employer's selection. The SMP will typically continue to 'roll' each year and remain the same for the majority of the population.

Standard Stability Period (SSP): The employer selected period during which the employee's healthcare coverage is in effect should he/she accept the coverage. The SSP must be equal to or greater than the SMP and can be no less than 3 months and no more than 12 months.

Timesheet Profile: This section of the system is under the Timesheet tab and includes each pay period hours upload for each individual employee. In addition, if needed, hours submitted can be edited using this portion of the system in the event of a timesheet error or upload issue.

Variable Hour Employees (VHE): Employees who have schedules with hours that vary from week to week, month to month, etc., or are in positions where the employee is uncertain of meeting the 30 hour per week/130 hour per month requirements put forth by ACA. These employees must be measured through a measurement period to determine benefit eligibility which will be based upon the number of hours worked during that period.