IRS 6055 and 6056 Data Only Timeline

<u>**Data Only Timeline**</u>

- Due 11/6 – Run initial data extract. Review, update and upload data back to Benefitfocus
- Due 11/20 – Retrieve updated data, review, and upload back to Benefitfocus
- After 11/20 – Full Extracts available to run from eEnroll as needed

Note: The HBR Administrator role is required to run the data extracts. Access to One Place 365 is also required. The HBR Administrators should have access to One Place 365, but if access needs to be requested, please have an existing One Place 365 user from your agency file a case via One Place 365 requesting your access. The Service team will set up the access, and you will receive an email notification with instructions on how to log in.

Disclaimer: Nothing contained in this instruction document should be considered as the rendering of legal advice to the employing unit with respect to the topics addressed herein. Each employing unit is responsible for obtaining such advice from their own legal counsel. Guidelines found in this document regarding what codes to select for Lines 14 and 16 of the 1095-C are based on IRS instructions as of the release of this document. A link to the IRS instructions is included in the instruction set. It is the responsibility of the Employer to ensure proper coding of these values.

- **Due 11/6 – Run initial data extract. Review, update and upload data back to Benefitfocus**

<u>How to Run Your Data Extract (HBR Administrator Role required)</u>

1. Log into the eEnroll System https://nc.secure-enroll.com/go/NC-SHP
2. Navigate to the "ACA Reporting" tab in the Data and Reporting section
3. Click Extract Data button
4. Select the Reporting to CSV option (this is the default option)
5. Select Default Coverage Code to the appropriate value to default the value for all employees as part of the extract [Optional Setting]
    - Code 1A will be the most commonly used value. Please see the section below for greater context regarding this "Line 14" code.
    - **Since this is a data only solution, which implies you are working with a separate vendor, it is likely that this code is not required for your needs. You may leave this blank if that is the case. Your vendor can advise you if it is needed.**
6. Accept the legal disclaimer by checking the box
7. Click Create Report
8. The screen will change and you will see your report listed with a status of RUNNING. When the status changes to COMPLETE, click the + icon and download the report.
9. The file is a CSV file which may be opened and edited in MS Excel

<u>What needs to be reviewed and updated?</u>

Since this is a data only solution, which implies you are working with a separate vendor, it is likely that the codes for Lines 14 and 16 are not required for your needs. You may ignore these fields if that is the case. Your vendor can advise you if it is needed.

The complete IRS instruction set for the 1095-C may be found here:
https://www.irs.gov/instructions/i109495c/ar01.html#d0e1062

- Columns M through X of the data extract represent the **Line 14** values of the 1095-C.
    a. These codes must be reviewed and updated as required for each employee.
    b. You can ignore the codes in the rows for Dependents. They are not required and won't be printed on the forms. You can identify dependents using Column C, Person Type.
    c. Line 14 is used to report the type of coverage offered to an individual for each month
        i. All of the SHP offerings for full-time employees meet the requirements for Minimum Essential Coverage (MEC) and they also meet the requirements for Minimum Value. Also, the employee contribution for self-only coverage is equal to or less than 9.5% of the mainland single federal poverty line.
        ii. The SHP offerings for part-time and LOA meet the requirements for MEC but do not meet the requirements for Minimum Value, since the employee is paying 100%.
        iii. Therefore, we recommend using the following codes
            1. **1A** for months where coverage was offered to a full-time employee
            2. **1F** for months where an employee who, for a portion of the year, was <u>not</u> full-time, was offered coverage and elected coverage.
            3. **1G** for months where an employee who was <u>not</u> full-time for any month of the year was offered coverage and they elected coverage.
            4. **1H** for months where no offer of coverage was made or where a terminated employee was offered COBRA
- Columns AK through AV of the data extract represent the **Line 16** values of the 1095-C.
    a. These columns will be blank on the data extract when you first receive it.
    b. The codes should remain blank for dependents. You can identify dependents using Column C, Person Type.
    c. We recommend using the following codes for employees.
        i. **2A** if employee was not employed during any day of the month
        ii. **2B** if employee is not full-time and did not enroll in coverage for the month
        iii. **2C** if employee enrolled in coverage for the month
        iv. **2G** if employee is full-time and did not enroll in coverage for the month
- Columns AW through BH of the data extract contain your agency's Federal Tax ID
    a. Review and modify if this information is not correct.
- If any of the demographic information for the individual is not correct, it may be modified in the data file, you may modify it within eEnroll or you may modify it via the Payroll files.
- If you have any employees not in Benefitfocus who need to be included on a 1095, you may add a row for them to the data file. Keep in mind that all full-time employees must be reported, even if they were only full-time for a single month and even if they waived coverage. Any part-time employees electing health coverage must also be included.
- If there are any individuals on the data extract who may have been terminated prior to the reporting year but not terminated in Benefitfocus, they may be removed from the data extract by deleting their data row. They should also be "cleaned up" in eEnroll.

How to Send the Data Back to Benefitfocus for the 11/6 Deadline

1. Upload the updated Data file into the One Place 365 Folder.
    - Go to https://oneplace.benefitfocus.com
    - Log in using your One Place 365 user account information
    - Click "Create a Case" in the upper right-hand corner of One Place 365
    - Fill out the case fields and put "1094/1095 Reporting" in the subject line, along with the name of your Employing Unit
        - NOTE: Putting "1094_1095 Reporting" in the subject line will allow Benefitfocus to identify these cases in One Place 365. **If "1094_1095 Reporting" is not included in the subject line, the case will not be routed to the appropriate service team member which can cause delays in the 1094/1095 reporting process.**
    - After you click "Submit," you **must** attach the updated Data File to the case. This completes the process.

- **Due 11/20 – Retrieve updated data, review, and upload back to Benefitfocus**

Between 11/6 and 11/13 Benefitfocus will be adding the Retiree, COBRA and HDHP (Medcost Plan) data to the data extracts. The updated files will be posted to One Place 365 and you will be alerted that they are ready to be retrieved from One Place 365.

How to Retrieve the Updated Data Extract

1. Go to https://oneplace.benefitfocus.com
2. Log in using your One Place 365 user account information
3. Locate the data file per the file name shared by Benefitfocus
4. Open the file by clicking on it.
5. Go to: File, Save As, Download a Copy

What needs to be reviewed and updated?

Since this is a data only solution, which implies you are working with a separate vendor, it is likely that the codes for Lines 14 and 16 are not required for your needs. You may ignore these fields if that is the case. Your vendor can advise you if it is needed.

- The Medcost data will include the Line 14 and Line 16 values. 1A and 2C will be used. There should be no need to modify these values, but you have the opportunity to review and modify.
- The Retiree data will include the Line 14 values. 1G will be used. There should be no need to modify these values, but you have the opportunity to review and modify. Line 16 values will be left blank and should remain blank for Retirees.
    - If any non-retiree uses code 1G for Line 14, their Line 16 code will be present from the updates performed during the initial review and update steps prior to 11/6.

- COBRA data will include the Line 14 values for months where the COBRA member was enrolled. Code **1H** will be used. You will need to identify employees who terminated with COBRA benefits during the year and ensure **1H** is entered for each month they were offered COBRA. For each month where **1H** is present for a COBRA member, use code **2A** for the Line 16 value.

How to Send the Data Back to Benefitfocus for the 11/20 Deadline

- Instructions for uploading the data back into eEnroll will be provided before the 11/20 deadline.
- One Place 365 will not be used for this upload.

– **After 11/20 – Full Extracts available to run from eEnroll as needed**

- Following a successful upload of the data into eEnroll by the 11/20 deadline, the extracts may be run as needed per the instructions for the 11/6 activities.
- The data in the extract will now contain all of the data you updated and approved in previous steps plus any additional employees and coverage updates that have occurred since the original data run.

Who can answer my questions about this process?

- Benefitfocus is available to help with the extracts and the upload processes : **SHP-ACASupport@benefitfocus.com**
- Your contact at SHP is mark.pfohl@nctreasurer.com