

# My Workforce Analyzer

## 2015 year-end processing guide

My Workforce Analyzer (MWA) is an innovative application for tracking and analyzing your company information and preparing federal legislative forms 1094-C (Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns) and 1095-C (Employer-Provided Health Insurance Offer and Coverage). Your Sage HR or Payroll program provides the data necessary to power My Workforce Analyzer, but some key information specific to your company and the Affordable Care Act legislation must be entered and verified for year-end processing.

### Processing checklist

Before you start:

- Complete all personnel and benefit changes for 2015 in your Sage program.
- Ask your healthcare provider which plan(s) meet the minimum essential coverage requirements, and if your healthcare coverage is self-insured. You can select these codes as qualified medical benefits in the setup windows.
- Ensure the offer of healthcare coverage was affordable during the year using one of the three safe harbor tests.
- Collect status change reports for the year 2015 that include your employees who:
  - Changed from part-time to full-time
  - Changed from full-time to part-time
  - Were terminated and rehired more than once in the year
  - Changed (stopped, started, or added or removed a dependent) healthcare coverage

### ACA Support

Visit [SageCity.na.sage.com/p/ACA](http://SageCity.na.sage.com/p/ACA) for additional resources, such as on-demand webcasts, training, guides, whitepapers, and more.



### Who receives a 1095-C?

To view all 1095-C forms that will print and eFile, you must use Sage Payroll Tax Forms and eFiling by Aatrix. My Workforce Analyzer prepares the forms while Aatrix allows you to eFile and print the forms.



### How are the 1095-C Part II codes and Part III selections determined?

If you use the import file, you must specify each code and covered individual. Otherwise, My Workforce Analyzer uses the employee record in your Sage program to parse dates and relevant dependent and beneficiary information.

### 1095-C Part II Line 14

If you specified code 1A on line 14, lines 15 and 16 are disabled in the Forms Wizard because they are not applicable to employers that used the Federal Poverty Level method to determine affordability.

### Part III of 1095-C

This section is only used for Self-Insured Employers and includes all covered individuals including the employee receiving the 1095-C.

### Applicable Large Employers (ALEs)

Form sets are created by employer as defined in your Sage program, but you can merge the 1094-C forms for multiple employers in Aatrix and edit the 1095-C forms to combine information for an employee who works for multiple employers.

### Online help

Click or [Learn more](#) on any window in My Workforce Analyzer to launch the online help and get instructions or more information about the window. You can access [help](#) online at any time.



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### Creating the federal ACA forms

When you have all the necessary information, you can begin creating ACA forms.

1. Review your company's settings in the **My Workforce Analyzer > Setup > Employer/Benefits** window.
2. Use the **Forms Wizard (Forms > Generate Forms)** to create both the 1094-C and 1095-C forms. The wizard allows you to specify the year, employer, and standard employee information for each form set.
  - You can either use the Forms Wizard or import a file with details for your employee offer and coverage codes (1095-C Part II) and covered individuals (1095-C Part III).
  - The required details include eligibility rules or applicable months for employees, safe harbor methods, offer of coverage codes, and the employee share of the lowest cost monthly premium for self-only coverage.
3. **Edit** and review your forms, and look closely at employees who had status changes in 2015 to ensure the changes are accurately reflected. You may need to edit some employees.
  - If an employee had a status change, review each month in the Part II and Part III sections of the 1095-C form for the affected employee.
  - Verify the correct codes and months are specified before and after the affected employee's status changes.
4. **Save** the forms. You can edit or delete and recreate them at any time before you print and file them.

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### Using Sage Payroll Tax Forms and eFiling by Aatrix

Once your forms are prepared, you can use Sage Payroll Tax Forms and eFiling to print the forms to distribute to your employees and eFile the forms with the IRS.

1. If you haven't already done so for payroll, register your company with Sage Payroll Tax Forms and eFiling by Aatrix (**Help > Register for eFiling** or **Aatrix eFile** in your Sage program).
 

**Note:** This is the same service for eFiling your Sage payroll taxes and files.
2. Open My Workforce Analyzer and select the **Forms** tab.
3. In the **Forms** panel, select the forms set (listed by year and employer) you want to print or file, and click (Print/eFile).
4. In the Sage Payroll Tax Forms and eFiling by Aatrix window, follow the prompts to review, print, and eFile your forms.

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