

Sage

My Workforce Analyzer

Year-End Processing Guide

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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 this year 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 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

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.
 - 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 this year 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.

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, 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.

Tip: Once you open the forms in Aatrix, to edit them again later click **View Drafts and Histories**. See help in My Workforce Analyzer for more information about the feature.

Support and resources

Sage strives to provide you with the best help and support in the industry. If you have a question, we're here to help!

- **Online Help:** Click  in the **My Workforce Analyzer (MWA)** product to open the online help. From there, click the **Getting started** link at the top of the page to learn more about **My Workforce Analyzer**.
- **Product Documents:** Access this and other documents from the [Sage HRMS Product Documents website](#).
- **Community Hub:** Visit the [Sage HRMS Year-end Centre](#) for additional guidance and information about how **MWA** supports the Affordable Care Act (ACA).
- **Sage Knowledgebase:** Search the [Sage Knowledgebase](#), which provides 24/7 access to support articles as well as the latest software downloads and updates.
- **Customer Support:** For other support resources, visit the [Sage Support Resource Centre](#) page, select your country, and then select your product.
- **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log in or create an account to register for training.