Will Sage 100 ERP support the Affordable Care Act (ACA) reporting requirements for 2015



Products

Sage 100 ERP Sage 100 ERP 2015 Sage 100 ERP 2014 Sage 100 ERP 2013 Sage 100 ERP 4.5

Description

Affordable Care Act (ACA) reporting requirements beginning Tax Year 2015

How do I determine if the number of hours an employee worked for affordable healthcare reporting requirements

How do I determine if an employee is full or part time for affordable healthcare reporting purposes

How do I file Form 1094-C and 1095-C

Disclaimer

Support

Sage Customer Support does not provide assistance for issues related to third party products or enhancements, hardware, report customizations, state or federal tax-related questions, or specific accounting questions. Please contact your Sage Business Partner, network administrator, or accountant for assistance. Please review <u>this document</u> for additional information on the scope of Sage Customer Support Services.

Cause

Effective 2015, employers with 50 or more full time employees (or a combination of part time and full time equivalent (FTE) employees to 50 full time employees) will be subject to the Employer Shared Responsibility provisions.

Employers will be required to track information around employee & dependent coverage by month and the number of full time employees for reporting purposes.

We will update this knowledgebase article as more information is made available. Click <u>here</u> to open the latest version of this knowledgebase article.

Resolution

The IRS released the final versions of the forms required for ACA reporting in February, 2015. See link below below to access final forms and instructions.

The current plan is to release this enhancement in product updates (PU), for Sage 100 ERP versions 4.50 and higher only.

- 2014 PU5 Released March 30, 2015 Search KB 60428 to download & install 2014 PU5
- 2015 PU1 Released April 7, 2015 Search KB 60763 to download & install 2015 PU1
- 2013 PU9 June 29, 2015
- 4.50 PU8 June 29, 2015

In order for this ACA reporting to pull your Payroll data correctly you <u>MUST</u> select to Retain Perpetual Payroll History in Payroll Options <u>prior to processing your first payroll in 2015.</u>

Please do or verify the following before processing your first payroll in 2015:

- 1. Open Payroll, Setup, Payroll Options
- 2. On the Main tab, select Retain Perpetual History
- 3. Click Accept

Note: This will need to be done for each Company Code requiring ACA reporting.

<u>1</u> . Main	2. Additional	<u>3</u> . Integrate	<u>4</u> . Forms	<u>5</u> . Direct Depos
Require Departments	in Pavroll		Current Processing Year	2010
	e or Local Earnings Entry		Current Quarter	4 🔻
Default State Tax Co	de	CA 🔍	Hours in a Work Year	208
Require Local Tax R	eporting			
Default Local Tax Co	de		Tip Allocation Rate	8.000
Retain Year to Date (Check History		Minimum Hourly Wage	4.2
Retain Perpetual Pay	-		Require Quarterly 941 Sched	lule B Printing
Allow G/L Accrual Po	ostings		Implement Qualified Employe	
Consolidate Payroll E	xpense Postings			
Summarize Taxes on	Check Stubs		Years to Retain eFiling Chec	k History 🛛 🗧

At this time we anticipate this Product Update for Payroll will include the following: (*Note: these changes and screen shots are not finalized and are subject to change*)

- New Crystal Report to help you determine if you qualify as an Applicable Large Employer (ALE) that is required to report on your compliance with providing affordable healthcare to your employees.
 - Currently, companies with 50+ full time and full-time equivalent employees will be required to file a report in January, 2016 (for Tax Year 2015). This report will provide options to report on the total

number of employees, the number of full time employees, the number of full time equivalents (FTE), and the average number of hours worked by employee (per calendar month). The report will pull data stored in the perpetual history file (PR_23).

Note: If the option to Retain Perpetual Payroll History is <u>not selected</u> in Payroll Options (see steps above) no data will show on this report.

Report Setting	STANDAR	D	Q			[Save
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Setting Options -					_		
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ACA Applicable Large Employer Report

Period End Dates: 01/01/2014 to 12/31/2014

ABC Distribution and Service Corp. (ABC)

Employee No	Employee Name	Jan Hrs	Feb Hrs	Mar Hrs	Apr Hrs	May Hrs	Jun Hrs	Jul Hrs	Aug C Hrs	Sep Hrs	Oct Hrs	Nov Hrs	Dec Hrs
11-0000003	Ferguson,Evan	177	160	0	0	0	0	0	130	40	0	0	0
11-0000100	THOMAS, JERRY A.	128	116	0	0	0	0	0	130	40	0	0	0
11-0000105	JENKINS, ALLEN	121	108	0	0	0	0	0	40	45	0	0	0

ACA Applicable Large Employer Report

Period End Dates: 01/01/2014 to 12/31/	2014											
				TOTA	LS							
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Number of Fulltime Employees:	1	1	0	0	0	0	0	2	0	0	0	0
Number of FTE Employees:	2	2	0	0	0	0	0	0	1	0	0	0
Number of Fulltime + FTE Employees:	3	3	0	0	0	0	0	2	1	0	0	0

Average Number of Fulltime + FTE Employees: 1

• After report prints, a prompt appears to update the ACA Employer Maintenance, Monthly Detail screen

ब्ख्र Sage	100 ERP	×
?	Do you want to update the Fulltime and Total Employee Count to the ACA Employer file?	

• New interface screens that will be able to be accessed from a new Payroll menu task or from within Employee Maintenance, for you to enter or import in the employee, employee's dependent(s) and health insurance offering data required on the forms.

	🔓 P/R Employe	e Maintenance			? = 🗆 🗙
	Employee No.	11.0000004	Last Name Ferguson	First Name Jim	
	<u>1</u> . Main	<u>2</u> . Wages	<u>3</u> . Checks	Wa	ning - Data Entry in Progress!
	Sort Field Address Zip Code City	100 Kenneth Place NE 98110 Bainbridge Island	State WA	Soc. Sec. No. 111-11-11 Marital Status Marrie Sex Male Statutory Employee Race Code	
	Phone No.	() ·		Pension/Profit Sharing	Direct Deposit
Employee No 11-000 Name Evan F Year 2015) 1/22/2015		Monthly Detail	
	Washington AVe				
Zip Code 9810 City Seatt	·	State WA			TST ABC 11/7/2014
1095-C Electronic Pa Provided Self Insure					
			Accept Del	ete <u>C</u> ancel 🕢	

• Regardless of whether the employee has accepted your offer of coverage, monthly detail of the offer must be tracked for reporting purposes. The screen shot below presents how this information will be entered. The copy button can be used to streamline data entry.

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• When an employee has accepted your offer of coverage, you will be able enter the information needed for reporting purposes on the covered individuals. In the example screen shot below, Jim got married in April and added his wife to his health insurance plan.

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• If you are reporting on more than one company and selected the Aggregated Group Indicator checkbox in the Monthly Details dialog, then the Other members button will be enabled to allow entry of the additional companies (name and EIN) included in the report.

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For the vast majority of customers, we recommend waiting for the release of the product update with the new ACA enhancements for the Payroll module. The functionality provided in these enhancements will streamline data entry.

Related Resources

ACA Reporting Worksheet for Sage 100 ERP How to report Employer-Sponsored Health Care coverage on the W2 form What files hold Affordable Care Act (ACA) information Where are the ACA Visual Integrator jobs located

Additional Information

Staying on top of the Affordable Care Act is critical—and challenging—particularly when it comes to your obligations under the law. With all the delays, legislative changes, and shifting regulatory interpretations over the past few years, you may be feeling a little overwhelmed now that 2015 is here.

As a trusted expert advising companies around the world for the past 30 years, Sage is ready to help support you through healthcare reform and answer your questions.

To assist you, we've set up an <u>Affordable Care Act center on Sage City</u> that includes many assets you may find useful in navigating the changes (please note, some assets require an active Sage Business Care plan to access). In addition, please join us live at a Sage-hosted<u>Inspire Tour 2015</u> location near you where sessions like "Affordable Care Act: How Sage is helping with requirements" may be presented.

You can download the attached ACA presentation for your own records and if you have questions after reviewing the presentation, you may contact Deborah Nelson, Sage 100 ERP Product Manager, at <u>Deborah.Nelson@sage.com</u>.

For more information on ACA, please visit the IRS sites listed below:

Final forms and instructions:

• <u>http://apps.irs.gov/app/picklist/list/formsPublications.html;jsessionid=wnTA0JKEV3NM41PWQomL9g</u>?value=1 095&criteria=formNumber&submitSearch=Find

Detailed information about ACA and the reporting requirements:

- <u>http://www.irs.gov/uac/Affordable-Care-Act-Tax-Provisions</u>
- <u>http://www.irs.gov/uac/Questions-and-Answers-on-Reporting-of-Offers-of-Health-Insurance-Coverage-by-Employers-Section-6056</u>

Category

Printing and Reporting Tax forms