



2017-2018 ACA Reporting Calendar

Cell Shading Key	
ACA Client Responsibility	Green
Efficient Forms Responsibility	Blue
Joint Client - EF Responsibility	Yellow

CHECKLIST DEADLINE DATES FOR COMPLETION OF NOTED TASK - FAILURE TO COMPLETE TASKS BY THE DUE DATE MAY DELAY DISTRIBUTION OF 1095'S FOR EMPLOYEES AND FILING OF 1094'S WITH THE IRS

Step	Checklist Items	9/30/2017	10/15/2017	10/31/2017	11/15/2017	11/30/2017	12/15/2017	12/31/2017	1/15/2018	1/31/2018	2/15/2018	2/28/2018	3/15/2018	3/31/2018	4/15/2018	4/30/2018	5/15/2018	5/31/2018	6/15/2018	6/30/2018	
1	Initial Site Data Review	<i>Send to Support team with updates as needed, see Page 5 for details</i>																			
	Contact Details for Company																				
	Owner of Firm																				
	HR Representative																				
	Payroll Contact																				
	Insurance Broker																				
	Review of Current Employee Data	<i>This will be a Development update with an "Edit Vitals" tab as part of the Views = Employees information</i>																			
	SSN Confirmation																				
	FT / PT Status																				
	Salary / Hourly Type																				
	Pay Rates																				
	Term Dates																				
	Import New Hires for 2017 NOT in Site																				
2	Import of Employee Data/ Data Corrections																				
3	Updated Payroll Imports for 2017 Data																				
		<i>This is for clients that want us to determine eligibility for 1095-C forms generation / distribution</i>																			
4	ACA Benefit Manager Updates	<i>MUST have all plans and classes covering ALL of calendar year 2017</i>																			
	Benefit Classes																				
	Benefit Plans Reviewed / Updated																				
	Site Updates for Plans																				
5	Coverage History Review	<i>This will include a new Dev built tab at the Views = Employees dashboard</i>																			
	Coverage History Details for 2017																				
	Coverage History for Self-Insurance Plans																				
	Individual Demographic Details (Dependent Information)																				
6	Initial 1094/1095 Generation																				
7	FINAL Payroll Import for Dec 2017	<i>Only required for clients that are determining Eligibility for employees</i>																			
8	Finalization Step of 1095's																				
	Required before printing or distribution																				
	Printing of 1095-C for distribution																				
9	1094-C Preliminary Review																				



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Step	Checklist Items	9/30/2017	10/15/2017	10/31/2017	11/15/2017	11/30/2017	12/15/2017	12/31/2017	1/15/2018	1/31/2018	2/15/2018	2/28/2018	3/15/2018	3/31/2018	4/15/2018	4/30/2018	5/15/2018	5/31/2018	6/15/2018	6/30/2018	
	Confirm Company Legal Data																				
	Update ALE Information by Month																				
10	Initial 1094-C Submission to the IRS																				
11	Corrections for Resubmissions to IRS																				
12	Final IRS AIR Submission Acceptance																				
13	Billing for ACA Services	Based on Monthly Contract PEPM and FINAL Client Approval of 1094/1095 forms																			

ACA Client Responsibilities

Checklist Items	Begin Date	Due Date	Notes
<i>Initial Site Data Review</i>	10/15/2017	10/31/2017	
<i>Contact Details for Company</i>	10/15/2017	10/31/2017	
Owner of Firm			See page 5 for required ACA Contact Information
HR Representative			See page 5 for required ACA Contact Information
Payroll Contact			See page 5 for required ACA Contact Information
Insurance Broker			See page 5 for required ACA Contact Information
<i>Review of Current Employee Data</i>	10/15/2017	11/15/2017	
SSN Confirmation			
FT / PT Status			
Salary / Hourly Type			
Pay Rates			
Term Dates			
New Hires for 2017 NOT in Site			
<i>Employee Import of Additional Employees / Data Corrections</i>	11/1/2017	12/15/2017	Each client will receive ONE Employee Import of employees to add to their ACA site. Additional employee imports will be \$125 per file
<i>Payroll Imports Updated for all of 2015-2017</i>	11/1/2017	12/15/2017	
<i>ACA Benefit Manager Updates</i>			
Benefit Plans Reviewed / Updated	10/15/2017	11/15/2017	Must send CURRENT PLANS to EF for Update
<i>Site Updates for Plans</i>	10/15/2017	11/30/2017	Must include all of Calendar year 2017 for ACA forms to be accurate
<i>Coverage History Review</i>			
Coverage History Details for 2017	10/15/2017	11/30/2017	
Coverage History for Self-Insurance Plans	10/15/2017	11/30/2017	December Coverage History can be updated manually
Individual Demographic Details (Dependent Information)	10/15/2017	11/30/2017	

ACA Client Responsibilities

Checklist Items	Begin Date	Due Date	Notes
Preliminary 1094/1095 Generation and Review	11/15/2017	12/31/2017	Begin Client Review of Employee 1095-C
Final Payroll Import for December Final Import of December HOURS Information	1/1/2018	1/10/2018	Essential for updating final 1095-C data
Finalization Step of 1095's Required before printing or distribution	1/15/2018	1/22/2018	
Printing of 1095-C for distribution	1/15/2018	1/31/2018	Can be printed for employee distribution or employee can log in and review
1094-C Preliminary Review Confirm Company Legal Data	1/15/2018	2/15/2018	MUST MATCH IRS Records for TIN and EIN
Update ALE Information by Month	1/15/2018	2/15/2018	
Initial 1094-C Submission to the IRS (EF Operating LLC will submit)	2/6/2017	3/31/2017	Must receive "Accepted" or "Accepted with Errors"
Corrections for Resubmissions to the IRS	4/6/2017	5/31/2017	
Final IRS AIR Acceptance for 1094C	4/6/2018	5/31/2018	
Billing for ACA Services Based on Monthly Contract PEPM and FINAL Client Approval of 1094/1095 forms	4/15/2018	6/30/2018	Begins once CLIENT Approves submissions
CHECKLIST DEADLINE DATES FOR COMPLETION OF NOTED TASK -- FAILURE TO COMPLETE TASKS BY THE DUE DATE MAY DELAY DISTRIBUTION OF 1095'S FOR EMPLOYEES AND FILING OF 1094'S WITH THE IRS			

ACA Contact Information

Contact Details for Company

Owner of Firm

Name
Phone 123-456-9876
Email

HR Representative

Name
Phone 123-456-9876
Email

Payroll Contact

Name
Phone 123-456-9876
Email

Insurance Broker

Name
Phone 123-456-9876
Email

Visit the Support Center to update any contact info you have on file with us. You can easily open a ticket, send an email, chat live or give a call! Click the button below:

