

IRS Forms 1094/1095 Software Demonstration Q & A (August 27, 2015)

Q1. Can we enter employees using an excel spreadsheet and what is the price for the service?

ANSWER: Yes, you can enter employer, employee, and dependent data via a .csv upload. Templates will be available to use. Using the template will allow you to avoid having to do manual data entry.

The first block for up to 10,000 employees is priced at \$595 per year. Additional blocks of up to 10,000 employees are \$250 per year per block.

Q2. Is this to be marketed to CPAs and businesses? Why are we looking at 1095B, doesn't that generally only apply to health carriers? Or will businesses need to file if they are 'self-insured'?

ANSWER: Businesses who are self-insured will need to file the 1095B. The demonstration was done on the 1095B as that was the form most fully tested and the operation between the two forms (1094B vs 1095B) will be substantially similar.

ANSWER:

Q3. Please address any extra costs for eFile/fulfillment costs.

ANSWER:

1094/1095 ftwilliam.com Fulfillment Service Pricing

An \$11.50 batch fee will be added per batch submitted.
Prices on the website are effective until September 30th, 2016.

Forms 1094-B / 1094-C / 1095-B / 1095-C		
2015 Forms Fulfillment Services		
Service	Description	Price (2015)
Employee Only	1. 1095-B (print and mail) 2. 1095-C (print and mail)	\$0.46/employee + Postage
Service	Description	Price (2015)
Federal Only	1. 1094-B (e-file) 2. 1094-C (e-file)	\$0.58/employee

Service	Description	Price (2015)
Federal & Employee*	1. 1094-B / 1095-B (federal e-file and employee print and mail) 2. 1094-C / 1095-C (federal e-file and employee print and mail)	\$0.93/employee + Postage

*Volume Discount Pricing - Federal E-file and Employee Print and Mail		
Number of Employees	% Discount	Price
0-5000	0%	\$0.93/employee + Postage
5001-10,000	5%	\$0.88/employee + Postage
10,001-20,000	10%	\$0.84/employee + Postage
20,001-30,000	12%	\$0.82/employee + Postage
30,001+	14%	\$0.80/ employee + Postage

Q4. For uploading will that be something done monthly each month as year goes by or one time at end of year?

ANSWER: The upload template is designed for a single upload at the end of the year once you have all the employee data ready.

Q5. Are you the authorized e filer if we use your service? Or does each employer have to register with the IRS?

ANSWER: Our understanding is that we will be the authorized e-filer, however we have contacted the IRS to confirm.

Q6. Since employers with >250 employees are required to electronically submit 1094s, can the system do that?

ANSWER: Yes, our system can e-file both the 1094-B and 1094-C forms.

Q7. Does your software calculate the codes for lines 14 and 16?

ANSWER: It will not. Line 14 is information that will come from the employer. Line 16 is part of the full time employee calculation that we hope to offer in future years.

Q8. Does the client have to supply the monthly codes for Part II of Form 1095-C or will the forms software calculate the appropriate codes based on enrollment information?

ANSWER: The client will need to supply these codes.

Q9. Will the 1095-C upload template include fields for lines 14, 15, and 16?

ANSWER: Yes.

Q10. Does the software print on blank paper or do we need to order pre-printed stock.

ANSWER: Blank Paper.

Q11. Will this webinar be available online?

ANSWER: You can access the recording by clicking on this link:

<https://ftwilliamevents.webex.com/ftwilliamevents/lsr.php?RCID=25b806e8d95183ed00a049435027d895>

Q12. Will there be a test center for file formats before we actually introduce live data?

ANSWER: We are working to release the software in the November time frame so that users can upload test data and view data in forms. We won't have a "test center", but rather customers will be able to view the software on the production site. Batch and fulfillment capabilities will be available in early January of 2016; the IRS e-filing fulfillment capabilities will come later.

Q13. If we are a firm providing preparation of 1094/1095 to our clients, would our fee structure be different? Would there be an extra cost for each client we set up or is it solely based on total number of forms across all clients?

ANSWER: We offer this system in blocks by the number of employees:

The first block for up to 10,000 employees is priced at \$595 per year. Additional blocks of up to 10,000 employees are \$250 per year per block. There is no extra cost for each client you set up – it is solely based on total number of employees across all clients.

Q14. Will you include software pricing along with the EFile pricing. Is it just one price for as many clients as we file this for?

ANSWER: See questions #14 and #3.

Q15. Who has to file 1095C? Does that apply to most businesses over 50 or only if they are self-insured?

ANSWER: 1095C will have to be filed by all large employers who, on average, have at least 50 full-time (or full-time equivalent) employees. This form is required if the employer offers an insured or self-insured health plan or if they do not offer a health plan at all. Small employers only need to file the 1095C if they are a member of a controlled group or affiliated service group where they have at least 50 full-time (or full-time equivalent) employees in aggregate.

Q16. As a broker who uses this site for their clients, would we be the ones doing the forms? Or would the individual companies be able to log in to and complete their own?

ANSWER: Yes, you would do the forms on behalf of your clients. We do not offer a solution at this time whereby your clients could log-in and complete their own forms.

Q17. What about mailing envelopes do you offer an envelope to enclose employee forms in?

ANSWER: If you use our fulfillment service, the price increase includes the form, envelope and postage. We do not offer envelopes for separate purchase if you choose to print and mail the forms yourself.

Q18. Will cost of mail services be developed by group or is that cost already available.

ANSWER: See question #3.

Q19. Will we get an email as soon as the template is available? We are getting clients and brokers asking for this.

ANSWER: Once the upload template is available (estimated next week or so), we will email all participants on the webinar copies of the templates.

Q20. Will employers log in similar to the 5500 to E-Sign and E-File?

ANSWER: We are still waiting for guidance. We do not have plans to offer a portal for signatures, but we need to wait for additional information.

Q21. Do you anticipate this software to be used by providers or by the plan sponsors themselves and what is the pricing?

ANSWER: Please refer to questions #17 and #24.

Q22. Will we be able to print the statements with a truncated SSN?

ANSWER: We have plans to offer truncation for SSNs time permitting.

Q23. Is it possible to group the employees with multiple pages either at the front of a "print all" batch or at the end so that you do not have to search through every page to locate them?

ANSWER: This will not be an option this filing season.

Q24. When you say using a template to enter members and family, do you mean there will be ability to download from our system to this file. Again, just to be sure we are avoiding manual entry.

ANSWER: We will provide a template for you to use to put your data into. You can download data from your system into this template and you will probably need to manipulate your data a bit to get it in the template format. The purpose of the template is to help you automate data entry as much as possible and avoid having to do a lot of manual entry.

Q25. Will your system produce the 1 and 2 codes automatically based on the data for the 1095C?

ANSWER: We are not sure what you mean by the '1 and 2 codes'. Please email us at support@ftwilliam.com or call 800-596-0714 to discuss.

Q26. What support is going to be provided for the codes on the C series? We will need to manually assign the codes on line 14 or do we have to submit the codes in the import file?

ANSWER: The system will not determine the codes. They can be entered via a spreadsheet upload, or manually entered.

Q27. How will e-filing work?

ANSWER: E-filing will work in a similar fashion as the 1099s and 8955s. Users will create a batch by selecting employers. The batch will then be edit checked and locked at which point users can choose a fulfillment option. Data is sent to the IRS once the user agrees to the associated fees.

Q28. Do we have to access each employee record to begin completing the employee statement? Or, can this information be populated in the template and uploaded?

ANSWER: Yes, you will be able to use the .csv templates to upload employer, employee and dependent data or you can manually enter employee data.

Q29. Do you know if HRA plans will need to file a separate 1095-B if integrated fully insured plan?

ANSWER: No, the HRA is a component of the health plan and the 1095B will be provided by the insurer of the main component (i.e., major medical plan, HDHP).

Q30. Do HRA's need to file any of these forms?

ANSWER: There are no separate reporting requirements for HRAs.

Q31. How does your system handle e-file corrections?

ANSWER: We have not finalized the correction process yet.

Q32. What is the scheduled release date? Apologies - but when will the template be ready?

ANSWER: See questions #13 and #1.

Q33. Is there a cost for access to the ACA feature within the system?

ANSWER: Yes, there is a cost to add this module. Cost is \$595 per year for up to 10,000 employees.

Q34. Does your e-file service provide TIN matching service?

ANSWER: We are considering offering TIN matching to our e-file service time permitting.

Q35. Will the software allow for the XXX-XX-NNNN SSN to be printed on available forms to participants, while the full SSN must be filed with the IRS?

ANSWER: See question #22.

Q36. For multi-employer Taft Hartley (joint union/employer sponsored)) welfare plans, where employers have employees NOT in THIS plan, how do employers address separate, non-union sets in a way to not repeat what is reported here?

ANSWER: This question is beyond what we can give an answer on. Basically it looks like the employers are supposed to do all reporting for both union and non-union but the multi-employer plan can elect to do the filing on behalf of the employers.

Q37: Can you do multiple plans for a given Welfare Fund?

ANSWER: In order to answer this question we need more information. Please email us at support@ftwilliam.com or call 800-596-0714 to discuss.

Q38: How will the codes be determined automatically if there are no other fields to populate the plan specifications?

ANSWER: The system will not determine the codes. They can be entered via a spreadsheet upload, or manually entered.