ACA TRACK Reporting Checklist

ACA filing deadlines are upon us once again! Are you ready? Our checklist will guide you through some of the considerations needed to help you through the process, ensuring you stay on top of Affordable Care Act reporting requirements.

Don't stress! Get organized, stay informed, and let's tackle ACA filing together!

Disclaimer: This checklist is for informational purposes only and should not be considered a full or complete representation of the information needed to complete ACA reporting. ACA TRACK recommends that you consult with your legal counsel or a tax advisor to determine your specific ACA reporting requirements. For more information on IRS requirements, please see the [Affordable Care Act](#).

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1. First, are you required to report under the ACA? If you select YES to any of the below questions, you will more than likely need to report to the IRS in accordance with the ACA: *

   - [ ] Our organization is considered an Applicable Large Employer (ALE)? Find out more: https://www.irs.gov/affordable-care-act/employers/information-reporting-by-applicable-large-employers
   - [ ] Our organization had fewer than 50 FTE's in 2022, but offer a self-funded plan?
   - [ ] Our organization had fewer than 50 FTE's, however we are part of an Aggregated ALE (more than 50 employees when combined)

2. Review your medical plans: *

Check all that apply.

☐ Do your plans provide minimum essential coverage and minimum value?

☐ Are the plans considered affordable? If so, what method was used to determine affordability?

☐ Do you offer dependent and spouse coverage?

☐ Do you offer an ICHRA plan?

☐ Do you have any union sponsored medical plans?

☐ Do you offer coverage to retiree's and their dependents?

3. Review and update the following information for each employee: *

Check all that apply.

☐ Employee Eligibility - only those eligible for medical coverage, even if no longer employed

☐ Dates of Employment

☐ Dates of Medical Coverage, including Cobra or retiree coverage in some cases

☐ Job Status: Full Time or Part Time

☐ Benefit Elections - Insured or Waived

4. Determine if you need state reporting: *

Check all that apply.

☐ Are you an ALE offering a combo funded plan (both fully-insured and/or self-insured) with employees in District of Columbia?

☐ Are you an ALE offering a self-insured plan with employees in California, District of Columbia, New Jersey or Rhode Island?

☐ Are you an ALE whose carrier doesn't provide state reporting on a fully insured plan?

5. Be aware of the deadlines and submit your forms by the required state and federal deadlines via [ACA TRACK Services](). NOTE: All deadlines are in the year *following* the reporting year. *

Check all that apply.

- [ ] Form 1095-C, deliver to your employees by March 1st, or January 31st for California residents
- [ ] Form 1094-C, deliver to the IRS by April 1st
- [ ] Form 1095-B, deliver to your employees by March 1st
- [ ] Form 1094-B, deliver to the IRS by April 1st
- [ ] Individual State Filing to the designated states varies by State

6. Common ACA Compliance Mistakes that ACA Track can help with: *

Check all that apply.

- [ ] Helping you determine which employees need to be reported, based on eligibility.
- [ ] Determining the plans and costs of the plans to be reported, including opt-out credits.
- [ ] Navigating situations with with multiple EIN's or changes in organization ownership.
- [ ] Reviewing unique situations such as employees that were rehired, acquired or transferred from affiliated organizations.
- [ ] Combining multiple reports from various HR or Benefit systems to capture required information.

[ACA TRACK](#) provides full-service ACA reporting for 1095 and 1094 forms, as well as state individual mandate reporting. ACA Track services include:

- We integrate with any payroll
- No manual line 14 or 16 code calculations
- Part time employee eligibility calculation
- State reporting for California, District of Columbia, New Jersey and Rhode Island
- Printing and mailing of forms and corrected forms
- Data quality analytics to detect common reporting errors
- Prior year reporting available
- Integrates with Workday and Prism Code Reports
- Experienced Project Managers to help navigate you through your data and find ways to simplify your reporting!

- Click [here](#) to receive a quote for services!