

1. COST AND COMPLIANCE RECORDS

Upon confirmation of your annual Medical insurance plan renewal, please update and add the ACA plan information for your lowest cost single plan.

Cost and Compliance records can be updated in the [ACA Center >> Setup >> Cost & Compliance](#).

Once you have set up your new Cost and Compliance record(s), be sure to assign the applicable ACA Employee Group to the record(s) to finalize this step.

Most Employee level validation errors are a result of incomplete or missing Cost & Compliance records. It is essential to keep these records up to date. Please review the [Fixing Common ACA Validation Errors](#) document to correct errors that are identified in the ACA Validation report.

2. NEW HIRES

For ongoing new hires, be sure to assign each new hire to an ACA Employee Group and ACA status when you are entering their new hire demographic information.

3. REHIRES AND QUALIFIED EVENTS

Be sure to add new ACA Status records to individual employees who may have been rehired or had a Qualifying Event during the calendar year (i.e. Marriage, Divorce, birth of a child, loss of medical coverage) that has affected their ACA Status or ACA Participation in your Company's Medical plan.

Employee Status Records can be updated in the [ACA Center >> Employee Status](#)

4. REVIEW YOUR RECORDS

It is extremely helpful, and highly recommended, to periodically run ACA reports to audit your records throughout the year and especially prior to submitting your records annually.

ACA Reports can be found in the [ACA Center >> Reporting](#).

Helpful Reports include:

ACA - Validation - This report will identify potential errors with your ACA data that may need to be edited in advance of the end of the year filing and 1095-C distribution. To fix these potential errors, please refer to the [Fixing Common ACA Validation Errors](#) document.

ACA - Employee Status - This report will give you a full list of status records setup on your employees that should be audited for accuracy.

ACA - Dependent Status - This report is **only** used if your health insurance plan is self-insured. This report can be used to audit and make sure all covered dependents have been correctly added for your enrolled employees.

5. SUBMIT RECORDS – ONLY AFTER REPORTING YEAR HAS CLOSED

The Checkwriters Reporting Deadline can be found in the Year-End guide each year.

Prior to submitting, it is important to complete the checklist:

- Review Cost & Compliance records for accuracy including any safe harbors that may apply.
- Review Validation Report and correct errors.
- Review Status records for accuracy and make edits as necessary.
- If you administer a Self-Insured Health plan, verify that covered dependents have been updated.
- Do you have any other companies that should be associated with your organization as part of an ALE Member Group that are not already listed? If so, please notify the Checkwriters ACA Team.

To submit, navigate to the [ACA Center >> Setup >> Submit for Printing and Transmittal](#)

1. Select the ACA Calendar Year
2. Select Check to Confirm
3. Submit