



Version 2.055 Release Notes

December 8, 2015



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Getting the Latest iCON Information

Certain new features in Version 2.055 require set-up steps. Use the checklist on the following page to update your system for each applicable area.

The Unicorn HRO website (<http://www.UnicornHRO.com>) contains the most up-to-date information about iCON.

On our web site, there are three documents that are of particular interest at year-end: *Taxes*, *SUI Reporting Set Up by State* and *W2 Reporting By State*. The *Taxes* document explains how each state tax is calculated for 2016. The *SUI Reporting Set Up by State* document explains how to set up your system to create SUI wage files. The *W2 Reporting By State* document gives information about the state W-2 file formats, state websites and any special set-up instructions that may be required.

These documents are available from the Documents section of the Help window in Manager Services, on our website through the iCON Documentation section of the Downloads area, or you can access them from the main page of iCON Tools:

1. From the main window, click on **Help**.
2. Click on **HelpLink**.
3. Click on **iCON Documentation**.
4. Select the document you wish to view.

Version 2.055 Checklist

Certain new features in Version 2.055 require set-up steps. Use the checklist below to update your system for each applicable area.

	Completed By	Date Completed
Review Release Notes		
Assign Function Security to the following new functions in Manager Services to applicable users. <ul style="list-style-type: none"> • ACA 1094-C / 1095-C Corrections • ACA AIR Error Report • ACA Consent Report • ACA Data Generation • ACA Employee Minimum Coverage Import • ACA Pay Code Exclusions • Employee Consent • Work Address Setup 		
Assign Employee Security to the following new functions in Employee Self Service to applicable users. <ul style="list-style-type: none"> • Consent for Electronic 1095-C • 1095-C Form 		
If you have employees in Puerto Rico and produce Forms 499R-2/W-2PR, the forms must include the Electronic Filing Confirmation Number. This is provided when you submit your W-2 file to Puerto Rico. After filing, enter the number in Legal Entity Definition on the Additional W-2 page in the Puerto Rico Electronic Filing Confirmation Number field for 2015. Also, a field called Cease of Operations Date has been added to the main page of Legal Entity Definition . Enter this date if applicable.		
If any of your employees are subject to Washington State Industrial Insurance Fund (SIIF), State Medical Aid Fund (SMAF) and State Supplemental Pension Fund (SSPF), you should have received your rates for 2016 from the state. Enter these in Tax Manager.		
In Retirement Plan Preferences , if you wish to limit the number of decimal places that an employee can enter in Retirement Deductions in Employee Self Service, select the applicable options in the Show Partial Percentage and Show Partial Fixed Amount fields.		

Federal Tax Changes

FICA Wage Limit Is Announced

The annual taxable wage limit for the Social Security portion (OASDI) of the FICA tax remains \$118,500 for 2016.

FUTA Ceiling Remains the Same

The FUTA wage ceiling remains \$7,000.

Railroad Retirement Board Announces Changes

The U.S. Railroad Retirement Board has announced that the taxable earnings base for Tier I will remain \$118,500 in 2016. Tier II will remain \$888,200 in 2016. The maximum monthly taxable earnings for Railroad Unemployment Insurance purposes will remain \$1,445.

Pension Plan Amounts Announced

The following 2016 dollar limitations for qualified retirement plans have been published by the IRS. Changes are shown in bold.

Plan Type	2015	2016
Elective deferrals, section 402(g)(1); affects 401(k) and 403(b) plans, among others.	18,000	18,000
Catch-up contributions for individuals age 50 or over (i.e., 401(k), 403(b) and 457 plans)	5,500	6,000
Defined contribution plan, section 415(c)(1)(A)	53,000	53,000
Annual compensation limit, sections 401(a)(17), 404(l), 408(k)(3)(C) and 408(k)(6)(D)(ii)	265,000	265,000
Defined benefit plan, section 415(b)(1)(A)	210,000	210,000
Simple retirement accounts, section 408(p)(2)(E)	12,500	12,500
Highly compensated employee, sec. 414(q)(1)(B)	170,000	170,000

State and Local Taxes

California Changes 2016 Withholding Calculations

For 2016 income tax withholding, the state has changed the low income exemption, standard deduction amounts, personal allowance amounts and the tax tables.

California Increases Disability Wage Base

The state disability insurance withholding rate paid by employees will remain 1.0%. The taxable wage base changes from \$104,378 to \$106,742.

Kentucky Changes for Local Tax

Boone County, Kentucky announced resident and non-resident rates will change to .8%. The wage limit will be \$58,727 for 2016.

Kentucky Changes Standard Deduction

Kentucky announced the annual standard deduction will change to \$2,460 for 2016.

New Jersey Disability Rate and Ceilings Change

The employee rate for Disability Insurance in New Jersey is changing from .25% to .20%. The Family Leave Insurance is changing from .09% to .08%. The wage ceiling for FLI, SDI, SUI and SWD is changing from \$32,000 to \$32,600.

North Carolina Publishes 2016 Withholding Calculation

For 2016 income tax withholding rate is to increase to 5.85% from 5.75%.

Ohio Local Taxes to Change

Various cities and school districts announced tax rate changes to take effect January 1, 2016.

Pennsylvania Updates Disability Wage Ceiling

The disability taxable wage base changes from \$9,000 to \$9,500 in 2016. The employee tax rate remains .07%.

Rhode Island Updates Disability Wage Ceiling

For purposes of the temporary disability tax, the taxable wage base changes from \$64,200 to \$66,300 in 2016. The employee tax rate remains 1.2%.

Unemployment and Disability Wage Bases Updates

Several states have adjusted their unemployment wages bases and other tax ceilings for 2016. A table is provided in the next section showing the states whose ceilings need to be changed on your system.

State Unemployment and Other Wage Bases Adjusted

Several states have adjusted their unemployment wage bases and other tax ceilings for 2016, shown in the following table.

State	Tax Type	Employer Wage Ceiling
Alaska (AK)	Unemployment	39,700
Colorado (CO)	Unemployment	12,200
Idaho (ID)	Unemployment	37,200
Iowa (IA)	Unemployment	28,300
Kansas (KS)	Unemployment	14,000
Kentucky (KY)	Unemployment	10,200
Michigan (MI)	Unemployment	**9,000 or 9,500
Minnesota (MN)	Unemployment	31,000
Montana (MT)	Unemployment	30,500
Nevada (NV)	Unemployment	28,200
New Jersey (NJ)	Disability Family Leave Insurance Unemployment Workforce Development	32,600
New Mexico (NM)	Unemployment	24,100
New York (NY)	Unemployment	10,700
North Carolina (NC)	Unemployment	22,300
Oklahoma (OK)	Unemployment	17,500
Oregon (OR)	Unemployment	36,900
Pennsylvania (PA)	Unemployment	9,500
Rhode Island (RI)	Unemployment	*22,000 or 23,500
Utah (UT)	Unemployment	32,200
Vermont (VT)	Unemployment	16,800
Washington (WA)	Unemployment	44,000
Wyoming (WY)	Unemployment	25,500

*For Rhode Island, the standard unemployment wage base will be \$22,000. For employers that pay at the highest UI tax rate, the wage base will be \$23,500.

**For Michigan, check MiWAM to confirm if your company qualifies for the \$9000 or \$9500 tax ceiling

Manager Services New Functions

This section describes the new functions that will be added to Manager Services.

The following functions will be added to the HR Actions menu:

- ACA 1094-C / 1095-C Corrections
- ACA Employee Minimum Coverage Import
- Employee Consent
- Work Address Setup

The following functions will be added to the Reports menu:

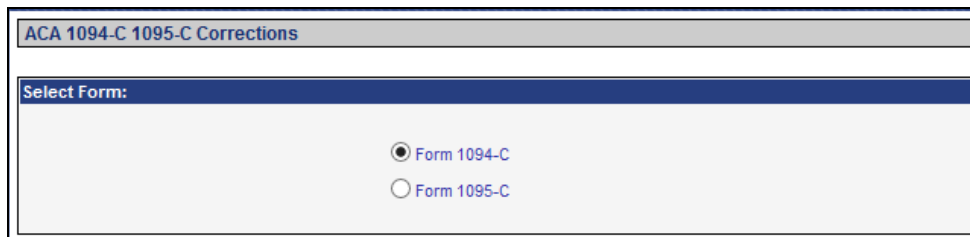
- ACA AIR Error Report
- ACA Consent Report
- ACA Data Generation

The following function will be added to the Payroll menu:

- ACA Pay Code Exclusions

ACA 1094-C / 1095-C Corrections

Use this function to make any necessary corrections to either the 1094-C form and/or the 1095-C forms.



ACA 1094-C 1095-C Corrections

Select Form:

☒ Form 1094-C

☐ Form 1095-C

1094-C Corrections

To make change to a 1094-C form that has already been submitted to the IRS, click the Form 1094-C radio button and click NEXT.

There are two options to enter your corrections.
The first option is to Enter Receipt ID and Submission ID.

ACA 1094-C Correction Search Selection

Select Search Criteria:

☒ Enter Receipt ID and Submission ID
☐ Enter Tax Year, Corporation and Company

*Receipt ID:

*Submission ID:

You will need to enter the Receipt ID and Submission ID issued by the IRS.

Click CANCEL to return to the previous screen without saving your changes or click NEXT to begin the process

The second option is to Enter the Tax Year, Corporation and Company.

ACA 1094-C Correction Search Selection

Select Search Criteria:

☐ Enter Receipt ID and Submission ID
☒ Enter Tax Year, Corporation and Company

*Tax Year:

*Corporation:

*Company:

After selecting the Enter Tax Year, Corporation and Company radio button, you will need to click on the drop down arrows to select the appropriate Tax Year, Corporation and Company.

Click CANCEL to return to the previous screen without saving your changes. Click NEXT to make modifications to any part of the 1094-C form. Click on any of the appropriate tabs to enter your changes.

Part I – ALE Member. This tab allows you to make corrections to anything related to the ALE Member or the total count for the number of 1095-C's submitted in the original transmittal.

Part II – ALE Information. This tab allows you to make corrections to the total number of 1095-C forms filed by an ALE Member or make corrections to the Certifications of Eligibility originally selected in the ACA Setup.

Part III – ALE Information – Monthly. This tab allows you to make corrections to the ALE Member information by Month.

Part IV – Other ALE Members. This tab allows you to make corrections to the original members of an Aggregated ALE Group. You will be able to make corrections by adding or removing members from the ALE Group originally reported on the 1094-C.

Click CANCEL to return to the previous screen without saving your changes.
Click SUBMIT to begin the process or resending the 1094-C Corrections form.

1095-C Corrections

To make changes to an employee's 1095-C form(s) that have already been transmitted to the IRS, click the Form 1095-C radio button and click NEXT.

There are two options to enter your corrections.

The first option is to Enter Receipt ID, Submission ID and Record ID.

ACA 1095-C Correction Search Selection

Select Search Criteria:

☒ Enter Receipt ID, Submission ID and Record ID
☐ Enter Tax Year and Employee Number

*Receipt ID:
 *Submission ID:
 *Record ID:

You will need to enter the Receipt ID and Submission ID issued by the IRS along with the Record ID of the employee that requires a corrected 1095-C form.


Click CANCEL to return to the previous screen without saving your changes or click NEXT to begin the process

The second option is to Enter Tax Year and Employee Number.

ACA 1095-C Correction Search Selection

Select Search Criteria:

☐ Enter Receipt ID, Submission ID and Record ID
☒ Enter Tax Year and Employee Number

*Tax Year:
 *Employee Number: 

After selecting the Enter Tax Year and Employee Number radio button, you will need to click on the drop down arrows to select the appropriate Tax Year. Next, you will need to enter the Employee Number in the text box provided. If you do not know the ID number, click on the Employee Search button.

Click CANCEL to return to the previous screen without saving your changes. Click NEXT to make modifications to any part of the selected employee's 1095-C form. Click on any of the appropriate tabs to enter your changes.

Part I – Employee/Employer. This tab allows you to make corrections to anything related to the Employee, ALE or Plan Start Month that was submitted in the original transmittal.

Part II – Employee Offer and Coverage. This tab allows you to make corrections to the Employee Offer of Coverage by Month that was submitted in the original transmittal.

Part III – Covered Individuals. This tab allows you to make corrections to the covered individuals and months of coverage related to Self-Insured plans only.

Click CANCEL to return to the previous screen without saving your changes. Click SUBMIT to begin the process or resending the 1095-C Correction form.

ACA Employee Minimum Coverage Import

Use this function to upload a file containing ACA Employee Minimum Coverage for employees that will be printed on their 1095-C Forms.

Click on the **Browse** button to select the file you wish to import. The file name must contain your Customer Number and it must be in the .csv format.

The file must contain one header row. Enter the field names in the header row, separated by a comma. You only need to enter the fields you wish to populate, but at least the mandatory fields must exist on the file. The mandatory fields are: Tax Year, Employee, Employee Name and Annual Coverage Cost. The field name

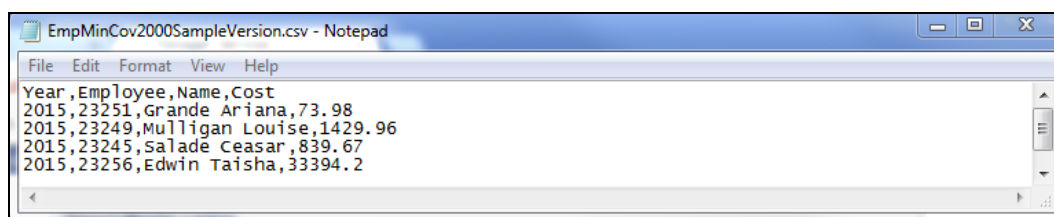
entitled Employee, is the Employee's Number in iCON. The format of the Employee Name is *last name <space> first name <space> middle initial*.

If any data values start with a zero, such as the Annual Coverage Cost, format the cells for these fields as Text (or another applicable format) in Excel so that any leading zeroes are stored.

The fields in the file do not need to be in any special order, but the field names in the header record must be exactly as shown below.

- Year
- Employee
- Name
- Cost

Here is an example of a file to be imported:




If the header row contains optional fields but no data is to be imported into those fields, a comma must be included as a placeholder for that field.

Click on **submit** to begin the process. The job will be sent to the job server. When the job completes, check the report in **Report Master Listing**. If no errors were found, a report called EmpMinCovImport will show how many records were imported. If any errors were found, a report called EmpMinCovErrors will print the row number and the reason for each error. No records will be imported if there are any errors. Correct the data and import the file.

Employee Consent

This function is used to capture an employee's consent to receive the 1095-C form. The employee's consent information is populated from their election in Employee Self-Service.

Julian Moore				
Employee Number:	170NJ100			
Job Title:	Manager - Intermediate Level			
Organization:	Cons. Group / Outback / New Jersey			
Employment Status:	Active			
Click to send e-mail message to employee		Quick Links		
Employee Consent				
Consent Type	Consent Given	Date Entered	Time Entered	Action
1095-C	Yes	11/20/2015	08:29:55	 delete

The Consent Type display will default to 1095-C. The Consent Given will display either Yes or No.

The date and time the consent was given will display. You will also have the ability to delete a record if there was an error.

Work Address Setup

Use this function to create work location addresses. The addresses can be linked to employees by selecting the W4 Address option in the Address function. The work addresses can also be imported using the Employee Address Import function.

Enter the required data and any additional data for this work location.

Update Work Address Setup	
* = Required	
Address	
Work Address Name:	Location #4
* Address Line 1:	743 King Street
Address Line 2:	
Address Line 3:	
* City:	Belleville
* State:	New Jersey
* Postal Code:	11454- -
* Country:	U.S.A.
County:	*no value
* Effective Date:	11/30/2015
Active Work Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Telephone	
Phone#:	
Cell Phone#:	
Fax#:	
Instructions:	
Country Access Code:	000
Cell Carrier:	*no value
Alternate Phone 1:	*no value
Alternate Phone 2:	*no value
Alternate Phone 3:	*no value
Alternate Phone 4:	*no value
Alternate Phone 5:	*no value

If a work address has an inactive status it will not be included in the drop down list in the Address function.

ACA AIR Error Report

This report will list the Employee Number(s) or Corporation/Company Descriptions for any 1094-C or 1095-C records that contain errors. If no errors are found, the report will indicate that No Errors are found.

ACA Consent Report

Based on the selection criteria this report will generate data regarding employees consent for electronic delivery of their 1095-C Form. If you are utilizing Employee Self Service, employees may have the option to receive their Form 1095-C electronically, if the employee agrees to the Consent form. The report can be generated by selecting an Effective Date and Tax year.

Drill down through the organization and click on the organization for which you wish to select levels for reporting. The levels will then appear in the Selected Levels box. Select the 'Include Terminated:' checkbox to include employees who have terminated during the selected tax year. The report name default is ACAConsentReport. This name will appear in the **Report Master Listing** so that you may identify the report.

Select one of the following sort options:

- a. Employee Number - This is the system default. The data will be listed in listed by sequentially by employee number.
- b. Employee Name - If selected, the data on the report will be listed in alphabetical order by the employee's last name.
- c. Consent Given - If selected, the data on the report will list all employees who have opted to receive Form 1095-C electronically.

ACA Consent Report

* = Required

- [-] Pennsylvania
 - [-] Shriver's
 - [-] Star Archive
 - [-] Starlight
 - [-] Value Sol.
 - Charlotte
 - Flor Pk CW
 - Florham Pk N
 - Florham Pk.
 - Madison
 - Morristown
 - Pequannock
 - Somerset
 - Wayne
 - Wayne Loc 2

Selected Levels:

Cons. Group / Value Sol.

Select Report Parameters:

*Effective Date: Include Terminated: ☐



*Tax Year:

*Report Name:

Sort By: ☒ Employee Number ☐ Consent Given ☐ Employee Name

When all selections have been entered, click on the Submit button. Once the report has completed processing, it will be displayed as a .csv file in **Report Master Listing**.

Report Master Listing

Display Reports From Date: To Date:  refresh  delete







To view PDF files, you should [download](#) the latest Acrobat Reader for your platform. [Select All](#) [Unselect All](#)

To view CSV files, Microsoft Excel should be installed on your computer. (|) (pipe) has been used as delimiter in these files.

To view XLS files, Microsoft Excel should be installed on your computer.

To view XML files, Microsoft Internet Explorer OR any XML file viewer should be installed on your computer.

To view TXT files, Microsoft Internet Explorer OR any TXT file viewer should be installed on your computer.

Open/Save	Report Name	Date Run	Time Run	Delete?
 	 ACAConsentReport-82271.csv	11/10/2015	4:17 PM	<input type="checkbox"/>
 	 ACAConsentReport-82267.csv	11/10/2015	2:41 PM	<input type="checkbox"/>

The report includes the following information about the employee:

- Employee Number
- Employee Name
- Employee ACA Status
- Company
- Term Date (if selected)
- Consent Type
- Consent Given (Y/N)
- Date Entered

ACAConsentReport-82271.csv - Notepad							
File Edit Format View Help							
Employee name	Employee number	ACA Status	Company	Term Date	Consent Type	Consent Given(Y/N)	Date Entered
John Jackson	111DC2	Part Time	Outback		No		
Emily Geary Laudi	1703001	Part Time	Outback	1095	Yes	11/06/2015	
Barry Nagelhaus	1703014	Variable Hour	Outback		No		
Leah M Jorgensen	17094	Full Time	Outback		No		
George W Alabama Zagey	170AL	Part Time	Outback		No		
Georgianne B Alabama	170AL2	Full Time	Outback		No		
Reese Alabama	170AL3	Full Time	Outback		No		
William Barkley	170AR	Full Time	Outback		No		
Paul Arroyo	170AZ	Full Time	Outback		No		
Joel Barth	170AZ10	Full Time	Outback		No		
Alicia Jones	170AZ3	Full Time	Outback		No		
Emilio Estevez	170AZ4	Full Time	Outback		No		

ACA Data Generation

Use this function to Build the data for the 1094-C and 1095-C forms, Transmit the AIR Files, Print the 1095-C Forms and to enter the Receipt ID from the IRS.

If you want to Build the Data and print the Exception report, click the Build Data / Exceptions Report radio button. Choose the Tax Year and the Legal Entity or Entities and click **Submit**. An ACA_Exceptions report will be submitted to **Report Master Listing**. View this report and make any necessary changes to your data, prior to Printing the 1095-C Forms and submitting the AIR file. If you choose **Cancel**, your selections will be reset.

ACA Data Generation

* = Required

☒ Build Data / Exceptions Report
 ☐ AIR Transmission Files
 ☐ Print 1095-C
 ☐ Enter Receipt ID

*Tax Year:

2015

*Legal Entity:

Allen Beverage
 Bergen County
 Carolina Design
 Cheesecake Fac.
 Discovery

If you want to Print the employees 1095-C forms, click the Print 1095-C radio button. Choose the Type of Transmission, Tax Year and Legal Entity or Entities. You can print the 1095-C forms for all employees or you can specify One Employee. Once your selections are made, click **Submit**. A Print1095-C.txt and Print1095-C.pdf files will be submitted to **Report Master Listing**. The .TXT file will give a count of the total number of 1095-C Forms in the file while the .PDF file will print a separate 1095-C Form for each employee selected. If you choose **Cancel**, your selections will be reset.

The screenshot shows the 'ACA Data Generation' window. At the top, it says '* = Required'. There are three radio buttons: 'Build Data / Exceptions Report', 'AIR Transmission Files', and 'Print 1095-C' (which is selected). To the right of 'Print 1095-C' is another radio button 'Enter Receipt ID'. Below these, under '*Type of Transmission:', there are two radio buttons: 'Original File' (selected) and 'Corrections File'. Below that is a text box for '*Report ID:' containing 'Print1095-C'. There is a checkbox for 'One Employee:' which is unchecked. Below that is a dropdown for '*Tax Year:' showing '2015'. At the bottom is a list for '*Legal Entity:' with options: 'Allen Beverage', 'Bergen County', 'Carolina Design', 'Cheesecake Fac.', and 'Discovery'. There are up and down arrow buttons next to the list.

If you want to send the AIR Transmission Files, click the AIR Transmission Files radio button. Choose the Type of Transmission, Transmitter (Company Name), TCC, Tax Year and Legal Entity or Entities. Once your selections are made, click **Submit**. Both the Manifest Header and the 1094C Request XML files will be sent to **Report Master Listing**. If you choose **Cancel**, your selections will be reset.

ACA Data Generation

* = Required

☐ Build Data / Exceptions Report
☒ AIR Transmission Files

☐ Print 1095-C
☐ Enter Receipt ID

*Type of Transmission:

☒ Original File
☐ Corrections File
☐ Replacement File

*Transmitter (Company Name):

*Transmitter Control Code (TCC):

*Tax Year: 2015

*Legal Entity:

- Allen Beverage
- Bergen County
- Carolina Design
- Cheesecake Fac.
- Discovery

If you want to enter the Receipt ID provided by the IRS, of you AIR File transmission, click the Enter Receipt ID radio button. Choose the Type of Transmission, Transmitter (Company Name), Receipt ID, Tax Year and Legal Entity or Entities. Once your selections are made, click **Submit**. The Receipt ID will be stored in the database.

If you choose **Cancel**, your selections will be reset.

ACA Data Generation

* = Required

☐ Build Data / Exceptions Report
☐ AIR Transmission Files

☐ Print 1095-C
☒ Enter Receipt ID

*Type of Transmission:

☒ Original File
☐ Corrections File
☐ Replacement File

*Receipt ID:

*Tax Year: 2015

*Legal Entity:

- Allen Beverage
- Bergen County
- Carolina Design
- Cheesecake Fac.
- Discovery

ACA Pay Code Exclusion

This function is used to exclude pay types from being used to calculate the number of hours worked by an employee under ACA regulations. By default the

system considers all pay types unless specifically excluded in this function. Select the pay codes that you want to be excluded when calculating the number of hours an employee is paid or entitled to payment when trying to determine if an employee should be classified as Full-Time or Part-Time.

Select the Legal Entity. This will display any pay codes which are currently excluded from the ACA calculation.

ACA Pay Code Exclusions + add

* = Required

*Legal Entity: Value Solutions ▼

Type of Pay	Action
Birthday	✕ delete
Expenses	✕ delete

+ add

If you wish to remove a pay code from this list simply click on the Delete button to remove the pay code.

To add additional pay codes, click on the Add button. This will display all pay codes currently set up for the legal entity you selected. On the Add page you have the ability to select one, multiple or all pay codes. Click on Submit to save your entries.

Add ACA Pay Exclusions

Legal Entity: Value Solutions

Click check boxes to select. Select All Unselect All

Select	Type Of Pay
<input type="checkbox"/>	3rd Party Sick
<input type="checkbox"/>	Adoption Reimb.
<input type="checkbox"/>	Advance EIC
<input type="checkbox"/>	Anniversary Ent
<input type="checkbox"/>	Bereavement
<input type="checkbox"/>	Birthday (Cal.)
<input type="checkbox"/>	Bonus
<input type="checkbox"/>	Bonus 2
<input type="checkbox"/>	Bonus-Referral
<input type="checkbox"/>	Christmas Bonus
<input type="checkbox"/>	Commission
<input type="checkbox"/>	Contingent Work
<input type="checkbox"/>	Dec. Tips-Cash
<input type="checkbox"/>	Double Time
<input type="checkbox"/>	Exempt Overtime

Manager Services Features

This section describes new features that will be added to Manager Services.

Benefits

In the Benefit Group table in **Common Object Dictionary**, a new field entitled **Retiree** has been added to allow the user to indicate whether the Benefit Group is a Retiree Plan. This new field is needed for the ACA in order to accurately report the Employee's Offer of Coverage on the 1095-C Form(s).

The screenshot shows a web form titled "Update Common Object Dictionary for Benefit Group". The form contains the following fields and controls:

- * Benefit Group: FUL
- * Short Description: F/T Employees
- Long Description: Full Time Employees
- Value Of Credit Per Dollar: 0.0000
- Flexible Benefit Group: ☐ Yes ☒ No
- Factor To Calculate Credits: 0.000
- COBRA Group: ☐ Yes ☒ No
- Payroll Deduction:
- Chart of Account Id:
- Retiree: ☐ Yes ☒ No

A black arrow points to the "Retiree" field. At the bottom of the form are two buttons: "submit" (green) and "cancel" (red).

Employment Information

Work Profile

There are two new fields added to the employees Work Profile.

Update Work Profile	
* = Required	
Position Data:	
*Original Hire Date:	06/05/2015
*Adjusted (Rehire) Date:	06/05/2015
Acquisition Date:	06/05/2015
Last Paid Date:	10/17/2015
Seniority Date:	
Projected Retirement Date:	05/01/2060
To modify the Organization and Job Title use the Transfer Employee function.	
*Organization:	Staff
*Job Title:	Applications Engineer III
Business Title:	
Reports To:	
To modify the status use the Employment Status function.	
*Status:	Active
*Status Date:	06/05/2015
*Status Reason:	New Hire
Security Class:	*no value
*FLSA Category:	Exempt
Labor Group:	*no value
Shift:	*no value
Clock Number:	
Source of Hire:	*no value
Agency:	*no value
WFM Security Role:	*no value
Weeks Worked:	10
Eligible for Avg. Rate Overtime: <input type="radio"/> Yes <input checked="" type="radio"/> No	
<input type="checkbox"/> Key Employee	<input type="checkbox"/> Highly Compensated Employee
<input checked="" type="checkbox"/> Pending State New Hire Reporting	Date Reported to State as New Hire:
<input checked="" type="checkbox"/> Enrolled in Onboarding	Onboarding Status: Not Started
Citizenship:	*no value
Multiemployer Interim Rule:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Effective Date:	10/10/2015
Safe Harbor Code:	*no value
Effective Date:	
Benefit Information:	
Benefit Group:	SLF Benefits
Benefit Start Date:	06/05/2015
Entitlement Group:	Full Time Group
Entitlement Elig. Date:	08/05/2015
FSA Group:	Full Time
HSA Group:	Full Time Group
User Defined Fields:	
Softball Team:	*no value
Name of Pet:	
Parking Spot:	*no value

Click the Multiemployer Interim Rule radio button to identify if an employee is covered under a multiemployer arrangement. This may include collective bargaining and/or union agreements. This field is effective dated.

Click the Safe Harbor Code radio button to over-ride the Safe Harbor Code at the company level in ACA Setup. The selection here is at the employee level and it supersedes what is selected in ACA Setup. This field is also effective dated.

Human Resources

ACA Setup

Two new required fields have been added to the ACA Setup function.

- 1) Is this the parent company of the corporation? Select either the Yes or No radio button for this new field. The parent data is required to display on the header record of the transmission file that is sent to the IRS.
- 2) Is ALE Member a Member of a Aggregated ALE Group? Select either the Yes or No radio buttons for this new field.
If you select “Yes” then Part IV of the 1094-C form will be completed and will need to list other EINs that are part of the corporation.

Update ACA Setup

* = Required

ACA Information:

EIN: 44-3569377

Tax Year: 2016

* Effective Date: 01/01/2016

Corporation: Consolidated Group Inc.

Company: Value Solutions

* Benefit Plan Year? Start: 01/01/2016

* End: 12/12/016

* Is this EIN the Authoritative Transmittal for this ALE group?

☐ Yes
 ☒ No

* Is this the parent company of the corporation?

☐ Yes
 ☒ No

* Is this EIN a member of an Aggregated ALE group?

☐ Yes
 ☒ No

* Designated Government Entity? (if yes, please complete DGE information below)

☐ Yes
 ☒ No

* Safe Harbor Codes:

☒ W-2 Income
 ☐ Rate of Pay
 ☐ Federal Poverty Line

Certifications of Eligibility (Select all that apply, click [help](#) for definitions):

☐ Qualifying Offer Method
 ☐ Section 4980H Transition Relief
 ☐ Qualifying Offer Method Transition Relief
 ☐ 98% Offer Method

* Contact (Contact will be listed on Form 1094-C and 1095-C):

* Contact Phone:

→ submit

cancel ←

Payroll

Deductions

This function is used to set up deductions for an employee. When you first access this function in **Payroll Actions**, all active and inactive deductions as of today's date will be displayed, as well as any future-dated deductions that may exist. You may change the Display As Of Date to view deductions that were in effect for a different date.

We have added the Status drop down menu to display Active, Inactive or All deductions.

Olivia Holmes
 Employee Number: 0630
 Job Title: Cashier
 Organization: Cons. Group / Value Sol. / Florham Pk N
 Employment Status: Active
[Quick Links](#)

Deductions
To update, click on information in the left column.

Deduction	Amount or Percent	Start Date	End Date	Active	Action
401(k) Plan	2.0000%	12/31/2007	12/31/9999	yes	delete
Group Term Life	0.0000%	06/15/2013	06/15/2013	no	delete
Medical	\$ 41.67	05/30/2013	12/31/9999	yes	delete

Display as of Date:
 Legal Entity:
 Status:

Active
All
 Inactive

Select Deduction to Add:

Retirement Plan Preferences

Two fields have been added: Show Partial Percentage and Show Partial Fixed Amount. Previously, the system allowed up to four decimal places for a Percentage to be contributed to a retirement plan such as 401(k), and two decimal places for an Amount, in the Retirement Deductions function in Employee Self Service. If you wish to allow less decimal places, use these fields to specify them.

In Show Partial Percentage, you may select 0, 1, 2, 3 or 4 decimal places. So, if your plan only allows employees to deduct full percentages such as 5% or 10%, select the option "0 decimal place". In Show Partial Fixed Amount, you may select 0 or 2 decimal places.

When adding a record in this function, Show Partial Percentage will default to 4 decimal places, and Show Partial Fixed Amount will default to 2 decimal places.

Update Retirement Plan Preferences

* = Required

Legal Entity:

*ALL

Benefit Group:

*ALL

Deduction:

401(k) Plan

Number of Days Required for Eligibility:

30

Date Rounding Option:

*no value

Minimum Age:

0

Provider Name:

Met Life

Provider Link:

http://www.metlife.com

Frequency:

Unlimited

☒ Allow Percentage

☒ Allow Fixed Amount

Allow different percentage for Supplemental Pay:

☐ Yes ☒ No

Allow different amount for Supplemental Pay:

☐ Yes ☒ No

Show Partial Percentage:

4 decimal places

Show Partial Fixed Amount:

2 decimal places

Minimum Percentage:

0.0000

Maximum Percentage:

20.0000

Minimum Amount Per Pay Period:

0.00

Maximum Amount Per Pay Period:

999,999,999.99

☒ Stop Employer Deduction When Employee Deduction is Stopped

Supplemental Pay Description:

submit

cancel

In the **Manual Payment function**, if an employee was terminated in the current year, and therefore did not have a Misc. Payroll record for the next year, the system would not allow a payment to be saved in the next year (such as an adjustment entered in January for the prior year). In this situation, the system required a Misc. Payroll for the year of the Manual Payment. The program has been changed to use the employee's last Misc. Payroll record to get the Pay Group. It will therefore allow an adjustment entered in the following year for an employee terminated in the current year.

SUI Quarterly Reporting

The Louisiana quarterly SUI wage file will require the employee's hourly rate of pay and job title description, effective January 1, 2016. For the hourly rate of pay, the program will add together wage amounts for pay codes marked as SUI Labor Hours, and then divide that total by the number of hours worked for these pay types. No set-up changes are required on your part.

Taxes

For California income tax withholding in 2016, the following have changed: low income exemptions, standard deduction amounts, exemption allowance amounts and the tax tables.

For Kentucky income tax withholding in 2016, the annual standard deduction will change to \$2,460.

Tools

Instant Notification

A new field called Message Template has been added to the Instant Notification screen. This allows you to “preload” a prepared template for an instant message. The subject and the message are populated.

Two templates are available:

1. “1095-C Consent”. This template can be used to send a message out to employees advising them that they can elect to receive their 1095-C form electronically through Employee Self Service rather than a paper copy. The subject and message can be changed after the template is loaded.
2. “Tax Document”. This template is used when 1095-C forms are ready. For legal reasons, the subject must be “IMPORTANT TAX DOCUMENT AVAILABLE” and cannot be altered. The message can be changed after the template is loaded.

Instant Notification

* = Required

Select Employee Population:

Select an organization level below:

- ☐ Cons. Group
- ☐ Zion

***Employment Status:**

- In Transit
- Lay Off (No return)
- Leave of Absence
- Long Term Disability
- No Entitlement Accrual
- Probationary
- Retired
- Short Term Disability

Message Template:

- No value
- 1095-C Consent
- Tax Document

Notification:

*Subject:

*Message:

*Option:

- ☒ Send To Work E-Mail Address Only
- ☐ Send As Text Message Only
- ☐ Send To First Address Found (Work E-Mail, Home E-Mail, Alternate E-mail or Cell Phone)

Instant Notification	
* = Required	
Select Employee Population:	
Select an organization level below: <div> <div>Cons. Group</div> <div>Zion</div> </div>	<div> <div>*Employment Status:</div> <div> <div>ALL Statuses</div> <div>Active ACA test</div> <div>Active F/T ACA test</div> <div>Active Part Time ACA test</div> <div>Contingent Workers</div> <div>FMLA Leave</div> <div>In Transit</div> <div>Lay Off (No return)</div> </div> </div> <div> <div>Message Template:</div> <div>1095-C Consent</div> </div>

Notification:	
*Subject:	Access Employee Self Service to Consent to Receiving Form 1095-C Electronical
*Message:	You are receiving this notification to inform you of the options for receiving Form 1095-C. Per the IRS regulations if your status was Full-Time at any point during the calendar year you will be receiving a 1095-C Form. You may consent to have the form furnished electronically via
*Option:	<input checked="" type="radio"/> Send To Work E-Mail Address Only <input type="radio"/> Send As Text Message Only <input type="radio"/> Send To First Address Found (Work E-Mail, Home E-Mail, Alternate E-mail or Cell Phone)

Instant Notification	
* = Required	
Select Employee Population:	
Select an organization level below: <div> <div>Cons. Group</div> <div>Zion</div> </div>	<div> <div>*Employment Status:</div> <div> <div>ALL Statuses</div> <div>Active ACA test</div> <div>Active F/T ACA test</div> <div>Active Part Time ACA test</div> <div>Contingent Workers</div> <div>FMLA Leave</div> <div>In Transit</div> <div>Lay Off (No return)</div> </div> </div> <div> <div>Message Template:</div> <div>Tax Document</div> </div>

Notification:	
*Subject:	IMPORTANT TAX DOCUMENT AVAILABLE
*Message:	For All Employees entitled to receive a 1095-C Form, if you consented to receive Form 1095-C electronically access Employee Self Service to retrieve the Form however if you did not consent to receive Form 1095-C electronically you will receive a paper copy.
*Option:	<input checked="" type="radio"/> Send To Work E-Mail Address Only <input type="radio"/> Send As Text Message Only <input type="radio"/> Send To First Address Found (Work E-Mail, Home E-Mail, Alternate E-mail or Cell Phone)

W-2 Processing

For 2015 W-2s that are viewed in the W-2 History function of Employee Self Service and Manager Services, the year has been updated as well as the W-2 instructions for the employee. On the Puerto Rico Form 499R-2/W-2PR that can be accessed from W-2 History, the year and the web site text have been updated.

On the federal W-2 file, if an employee's Social Security Number begins with 666 or 9, it will be written as 000000000. Per the EFW2 instructions, Social Security Numbers may not begin with a 666 or 9. To determine whether any of your employees have this scenario, run the W-2 Validation Report; the report has been changed to include this situation.

On the federal, state and W-2 files, if there is text in quotes or parentheses in the First Name field, it will be removed. This may occur in the case of a nickname being included in the First Name field. Note that nicknames should be entered in the Preferred Name field, which is not written to the W-2 files.

On the federal, state and W-2 files, a zip code extension will only be written if the zip code field in iCON contains 4 numbers in positions 6-9. If the zip code extension only contains 1, 2 or 3 digits, this field will be blank on the W-2 file.

On the Connecticut W-2 file, positions 174-178 in the RE record have been changed. This field will now write the Kind of Employer (from Legal Entity Definition) as left-justify, blank fill.

Employee Self Service New Functions

This section describes the new functions that will be added to Employee Self Service.

The following function will be added to the Personal menu:

- Consent for Electronic 1095-C

The following function will be added to the Payroll menu:

- 1095-C Forms

Consent for Electronic 1095-C

Employees can use this function to consent to receive Form 1095-C electronically.

The screenshot shows the iCON system interface. At the top, it says 'Welcome, Julian Moore'. On the left is a navigation menu with the iCON logo and links for 'Personal', 'Consent for Electronic 1095-C', 'Employee Directory', 'Personal Data', 'I-9', and 'Address Information'. The 'Consent for Electronic 1095-C' link is selected. The main content area is titled 'Consent for Electronic 1095-C' and shows 'Julian Moore' at the top right. Below the title is an 'update' button. A table displays the consent status:

Consent Given	Date Entered	Time Entered
Yes	11/20/2015	08:29:55

1095-C Form

Employees who have consented to receive Form 1095-C electronically will be able to view, save and print their 1095-C form in Employee Self Service. The 1095-C form will be displayed in pdf format.

The screenshot shows the '1095-C Form' page for Julian Moore. It includes instructions: 'To view 1095-C Form, click on the Tax Year in the left column.' and 'The 1095-C Form is displayed in PDF format and requires the Adobe Acrobat Reader. If the Adobe Acrobat Reader is not installed on your computer, you can download a free copy from the Adobe web site: <http://www.adobe.com>.' Below this is a table with two columns: 'Tax Year' and 'Date and Time Form Created'.

Tax Year	Date and Time Form Created
2015	12/01/2015 16:13:43

Employee Self Services Features

This section describes new features that will be added to Employee Self Services.

Address

The **work location addresses** can be linked to employees by selecting the W4 Address option in the Address function. The work addresses can also be imported using the Employee Address Import function.

In the Address drop down menu select the W4 Address option. Enter an effective date of this address.

Add Address	
* = Required	
Status Information	
* Address Type:	W4 Address <input type="button" value="v"/> Active: No
* Effective Date:	12/04/2015
* Work Address Name:	*no value
Address	
Address Line 1:	Location #1 Location #3 Location #4

Once you select the Work Address Name the data will be populated with the same data entered in the Work Address Setup function in Manager Services.

Add Address			
* = Required			
Status Information			
* Address Type:	W4 Address	Active:	Yes
* Effective Date:	12/04/2015		
* Work Address Name:	Location #4		
Address			
Address Line 1:	743 King Street		
Address Line 2:			
City:	Belleville		
State:	New Jersey		
Postal Code:	11454		
Country:	U.S.A.		
County:	*no value		
Telephone			
Phone#:	() -	Country Access Code:	000
Cell Phone#:	() -	Cell Carrier:	*no value
Fax#:	() -		
Instructions:	<input type="text"/>		
Alternate Phone 1:	*no value	() -	
Alternate Phone 2:	*no value	() -	
Alternate Phone 3:	*no value	() -	
Alternate Phone 4:	*no value	() -	
Alternate Phone 5:	*no value	() -	

Note many fields are locked down. If changes are required the changes need to be made in the Work Address Setup function and will be applied to all employees who are linked to the same Work Address Name.

The Employee Address Import function may be used to upload this information to many employees at a time.

iCON Tools New Features

This section describes the new features that will be added to the iCON Tools module.

Benefits

In the Benefit Group table in **HR Common Object Dictionary**, a new field entitled **Retiree** has been added to allow the user to indicate whether the Benefit Group is a Retiree Plan. This new field is needed for the ACA in order to accurately report the Employee's Offer of Coverage on the 1095-C Form(s).

Taxes

The 2016 tax programs for federal, state and local taxes will be provided with Version 2.055.

For California income tax withholding in 2016, the following have changed: low income exemptions, standard deduction amounts, exemption allowance amounts and the tax tables.

For Kentucky income tax withholding in 2016, the annual standard deduction will change to \$2,460.