
CheckMark 1095

User's Manual



CheckMark™

1095

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Chapter 1

Getting Started

CheckMark 1095 helps centralize all your 1095 (Affordable Care Act) filing needs. With this program you can print or even e-file all forms needed for filing 1094-B, 1095-B, 1094-C and 1095-C. The program will print the forms on a blank sheet of paper.

Before starting the set up of your employer and employees, please read through this manual. It covers general setup and 1095 requirements, as well as how you can receive additional support directly from Checkmark, Inc.

System Requirements

CheckMark 1095 can be installed on a computer running either Macintosh or Windows operating systems. This software is a single-user application and not designed for multi-user access of the data files. **DO NOT** install the application program on a server. Install the program locally on the user's hard drive even if you save the data on a server.

Users will need to have a computer running an operating system of either **Windows 7 or higher including Windows 10**, or **Macintosh OS X 10.6 or higher including El Capitan**.

Along with a compatible printer, the latest version of **Adobe Reader** is also required to properly print the forms from the program. You can download a free copy of Adobe Reader from Adobe's website at www.Adobe.com.

Whichever operating system you choose, a working knowledge of the operating system is essential. For more information about the basics and navigation of your operating system, see the user manual that came with your computer.

Software and Patch Updates

Each year the program is issued with the latest 1095 Forms as well as added features. Program patches are released as needed throughout the year for the current version of the software. Patches are available online at www.checkmark.com. Hard Copy CDs can be purchased by calling the sales department at 800-444-9922.

Renewal notices are sent out each year, in the fall, announcing the next update. Updates must be purchased each year to receive support and the ability to install patches for changes.

How to Get More Help

This manual covers general set up and reporting. There may be items that are specific to your employer that are not addressed here except in general terms. For these times, CheckMark, Inc. offers additional support.

Only registered users can receive technical support so please, take a moment and read the License Agreement, fill out the Registration Card and send it in.

Support is offered via internet submission, E-mail, fax or telephone. Whenever you contact support, have your customer number available. It is important that you are at your computer with CheckMark 1095 running when speaking with support to best resolve your question/problem.

Before Contacting Support/Other resources

Check for latest version

Users with internet access can make sure that they are up-to-date as often as they wish by selecting **Check for Updates** under the **Help** menu in the program. If necessary, download and install the latest update (may require purchase if not using the current year's version).

1095 Manual

Users can access the 1095 program manual from the Help menu while in the CheckMark 1095 program. An updated manual is included with each update.

Online Knowledge Base

Users with internet access can reference the online Knowledge Base for answers to common questions. You can access the Knowledge Base directly from the CheckMark website at www.checkmark.com.

Contacting CheckMark

For questions regarding the 1095 software, you can choose one of the following methods to request technical support:

Online at: <http://www.checkmark.com> Click on support and select Request Support

By Phone: 970-225-0387

Mail: CheckMark, Inc.
323 West Drake Road, Suite 100
Fort Collins, CO 80526

Chapter 2

Installation and Basic Use

Installing CheckMark 1095

Macintosh Installation

1. Close all programs and disable any anti-virus software.

For CD Installation

2. Insert the CheckMark 1095 CD-ROM into your computer's drive.
3. When the CD icon appears on the Desktop, open by double-clicking it, then double-click the CheckMark 1095 installer.
4. Follow the on-screen instructions to complete installation.

For Download Installation

5. Click on the link provided to download. After the download is complete, double-click the download file.
6. Follow the on-screen instructions to complete installation.

It is recommended to install the program on the local hard drive.

The default install location on the hard drive for CheckMark 1095 is: **Macintosh HD\Applications\CheckMark\1095\year**. The (year) represents the current calendar year.

Windows Install

1. Close all programs and disable any anti-virus software.

****For CD Install****

2. Insert the CheckMark 1095 CD-ROM into your computer's drive.
3. The Installer will start automatically.

If the installer does not start automatically after a minute, click your **Start** menu and then select **Run**.

Type in the path and filename in the **Run** box. That would be the drive name, colon (:), backslash (\), Filename. For example: **D:\setup**. Then click **Ok**.

4. Follow the on-screen instructions to complete installation.

****For Download Install****

5. Click on the link provided to start the download. After the download is complete, Choose **Run** or **Open**.
6. Follow the on-screen instructions to complete installation.

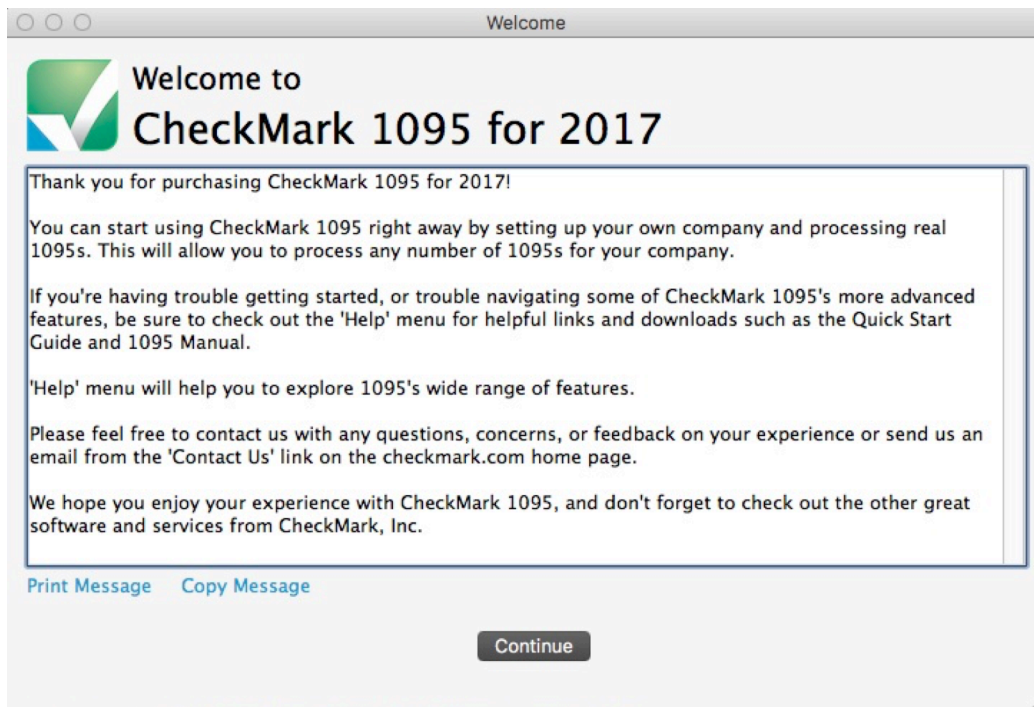
It is recommended to install the program on the local hard drive.

The default install location on the hard drive is **C:\ProgramFiles\CheckMark\1095\year**. The (year) represents the current calendar year.

Opening CheckMark 1095: New User

1. Open the CheckMark 1095 application. You can use either the shortcut or alias that was created or go to the CheckMark 1095 folder that was installed and double-click the CheckMark 1095 application file.
2. The first time you open the program the welcome screen appears.

Click the **Print** button to print out this information.



Important: It is recommended that you set up a password to protect your private information. For information on setting up passwords, See “Setting up Users and Passwords” on page 19.

Opening CheckMark 1095: Upgrading Old Files

The information will be stored in a database that is created the first time you open your previous files. the default location is:

Macintosh: HD\CheckMark\1095\year)

Windows: C:\CheckMark\1095\year)

1. Open the CheckMark 1095 application. You can either use the shortcut or alias that was created or go to the CheckMark 1095 folder that was installed and double-click the CheckMark 1095 application file.
2. If you have a previous 1095 database from a prior year, the program will ask you if you want to import the Employer and Employee information.
3. Click **Yes** to continue. Enter the Username and Password from the prior year, if requested.



4. A pop up window asks if you want to clear out the prior insurance information and amounts. Click **Yes** to clear that information and continue or **No** to retain the prior year's information
 5. If you clicked **Yes**, you'll be notified once the data is successfully imported.
-

Database Manager

CheckMark 1095 stores employer data in a database. When initially opening CheckMark 1095, a database named **CheckMark_1095_Database_[year]** is created.

If you complete 1095 forms for only one employer, this is probably the only database you will need.

However, if you process forms for more than one employer, you will need to choose one of the following options to manage your companies correctly. You can either store all of your employer files in the same database, or you can create separate databases and store individual companies in them.

Storing Multiple Employer Files in the Same Database

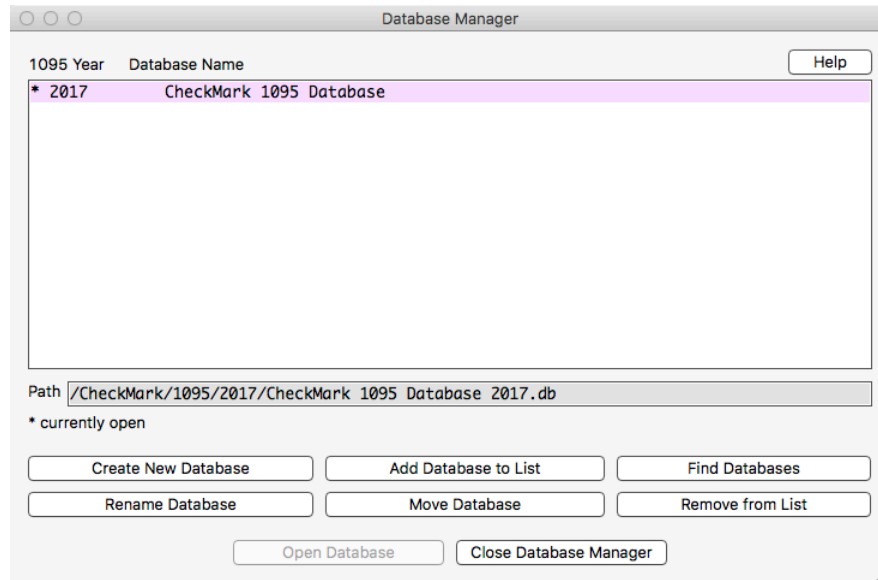
Each database can contain multiple companies. The advantage of storing all of your different employer files in one database is that when you Backup Database, Restore DataBase, Close Database, or advance to a new year, all companies stored in that database will be backed up, restored, closed or advanced to a new year at the same time, saving you time.

Storing Employer Files in Separate Databases

The advantage of storing each of your employer files in separate databases is that you have more control over where your database is stored on your computer, as well as when you want to **Backup Database, Restore Database, Close Database**, or advance companies to a **New Year**.

Using the Database Manager

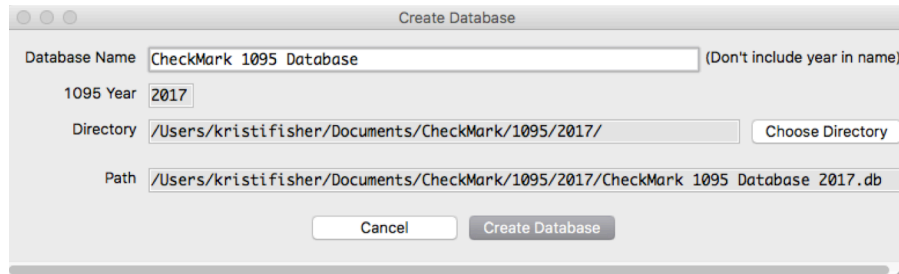
Choose **Database Manager** from the **File** menu.



Create New Database

This option allows you to create and save a new database in any location you wish. Keep in mind that each database can store multiple companies.

1. Click **Create New Database**.
2. Enter a **Database Name** and **Payroll Year**. Click the **Browse** button to select a new location to save the database.



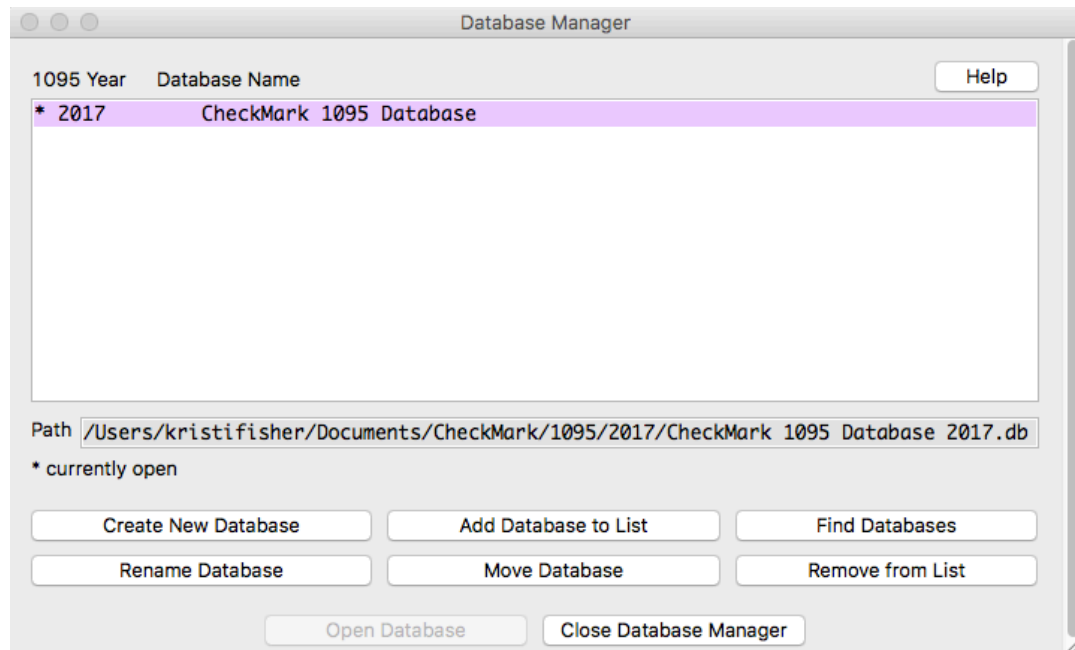
3. Click **Create Database** to save the new database.
-

Add Database to List

This button allows you to add an already-existing database to the list. For example, if you copied a database from another computer and the **Database Manager** does not list this database, you can choose **Add Database to List** and browse to that location to update the **Database Manager's** list.

1. Click **Add Database**.

An Open dialog box appears



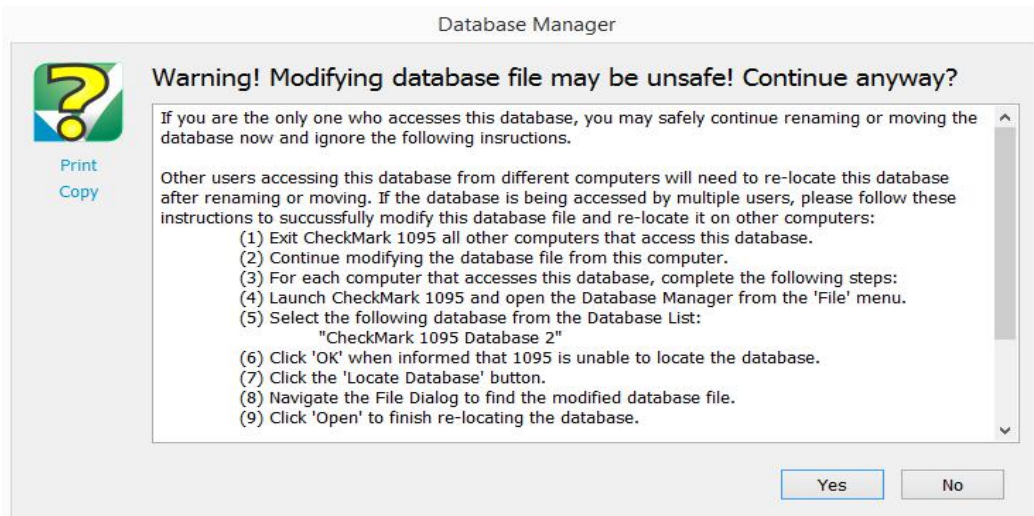
2. Browse to the location where the database is saved.
3. Select the database and click **Open**.

The database is added to the list in the Database Manager.

Rename Database

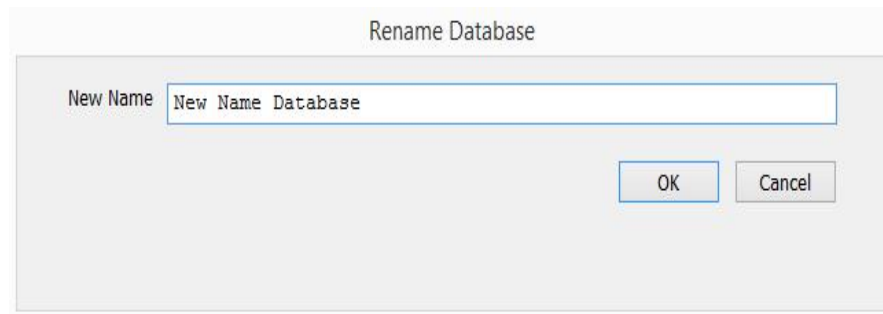
This option allows you to rename the database. It is recommended that you use only alphanumeric characters.

1. Click **Rename Database**. The following alert appears:



2. Click Yes. Otherwise, if you don't want to rename at this time, click no
3. Enter the new name and click **Rename Database** to save.

The Rename Database window appears:



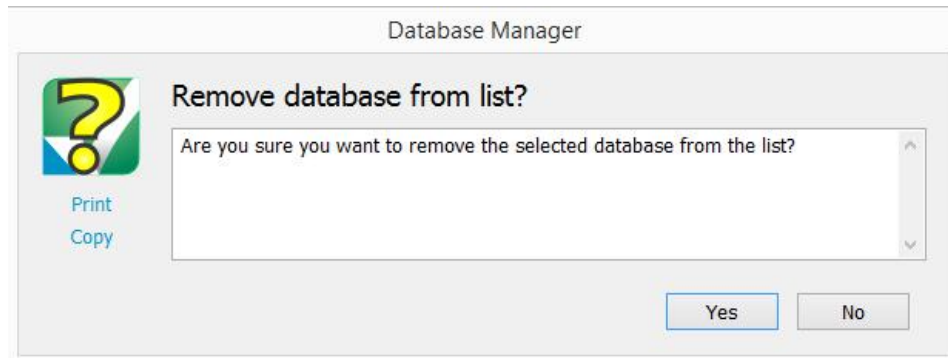
Remove From List

This option allows you to remove a database from the list.

Note: This only removes the listing in the **Database Manager**. It does not delete the database file from the saved location. To delete a database, you will need to manually delete the database (.db) file from your hard drive or saved location.

1. Click **Remove From List**.

A Warning message appears



2. Click **Yes** to remove the database from the Database Manager list.

You can add the database again at anytime by using the Add Database command as long as you don't delete the database from the computer.

Open Database

This option allows you to choose a different database and open it up to view all saved companies in that particular database.

1. Select the database you want to open and click **Open Database**.

The new database is now open and all companies stored in this database are now available.

Close Database Manager

This option closes the Database Manager window.

Update Employer

This commands allows you to update the currently selected employer's information. Once the program is launched, open the database that contains the employer you want to update. Highlight the employer Employer and click the **Update Employer** command. Enter the information you want to change, then click **Update Employer** to save the changes.

New Employer

This Command allows you to add a new employer to the database that is currently open. Once the program is launched open the database you wish save the employer in. Click **New Employer** then enter the information for this employer. Click **Add Employer** to save the employer to the database.

Delete Employer

This command allows you to delete an employer from a currently opened database. Once the program is launched open the database that contains the employer you want to remove. Click **Delete Employer** and a screen will appear to make sure you want to delete the employer. Click **Confirm Delete** to complete the deletion process.

Exiting CheckMark 1095

To exit or quit CheckMark 1095:

- Choose **Exit** from the **File** menu (Windows)
- Choose **Quit** from the **CheckMark 1095** menu (Mac)



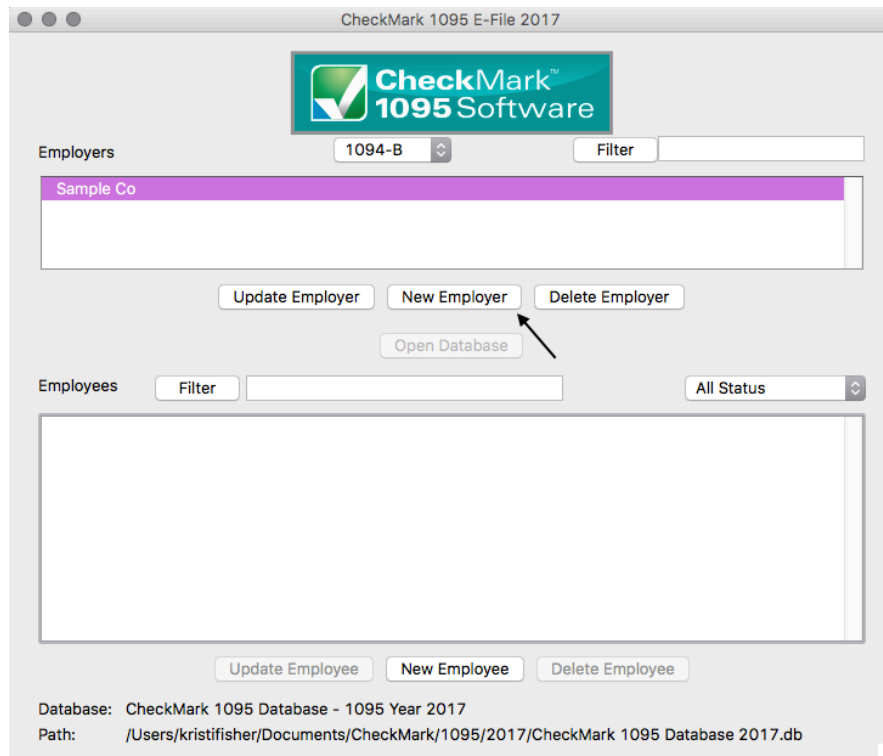
Chapter 3

Creating a New Employer

This chapter shows you how to create a new employer file and enter basic employer information.

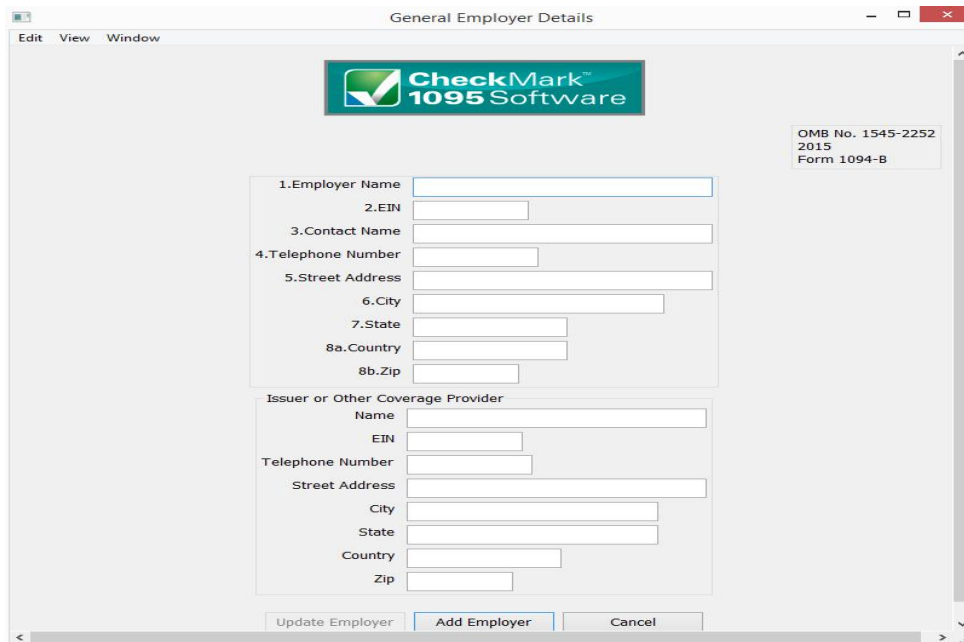
Creating a New Employer

1. On Windows, double click the 1095 shortcut on the desktop or click the **Start** menu, select **Programs**, then select **CheckMark 1095** from the CheckMark Inc. File. On Macintosh, double click on the CheckMark 1095 alias on the dock or on your Desktop, or double click the **CheckMark 1095** icon located in the install folder that was installed on your hard drive
2. Click the New Employer button in the middle of the screen.



Note: If the **New Employer** button is greyed out that means you need to first open a database or create a database. For **Creating a Database** please see page 9

3. Enter **Employer Information** for all required fields.



4. Click **Add Employer** button to **Save**.

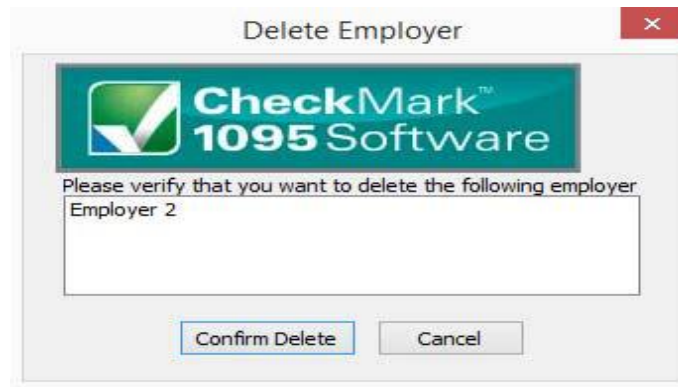
Updating an Existing Employer

1. Highlight the employer in the list you wish to update and click the **Update Employer** button.
 2. After all changes have been made to the **Employer Information**, click the **Update Employer** button to save the changes
-

Deleting an Employer

You cannot delete an employer if there are any employees created within the employer. You must delete the employees first before deleting an employer. For information on deleting employees see “Deleting an Employee” on page 27.

1. Select the employer you wish to delete.
2. Click **Delete Employer**
3. In the pop-up window, click the **Confirm Delete** button.



If no employees are associated with this employer, the employer will be deleted.

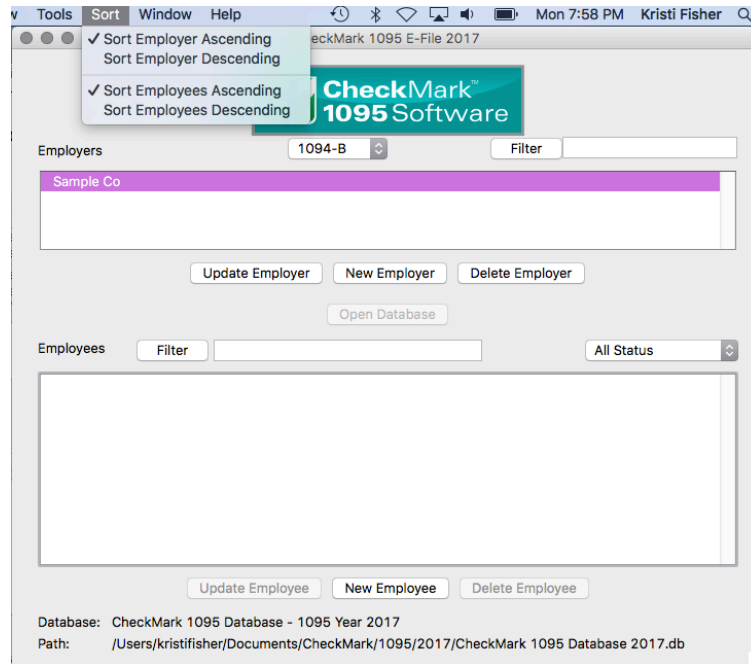
Filtering Employers

You can use the **Filter** button to search for certain employers in the list. To find a particular employer, enter all or part of the name of the employer into the Filter box area at the top of the screen and click the **Filter** button. The Filter will search for any employers that contain those variables.

You can also use an asterisk (*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N*), you will receive all employers that begin with the letter “N”.

Sorting Employers

You can sort employers by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Employers Ascending** or **Sort Employers Descending**.



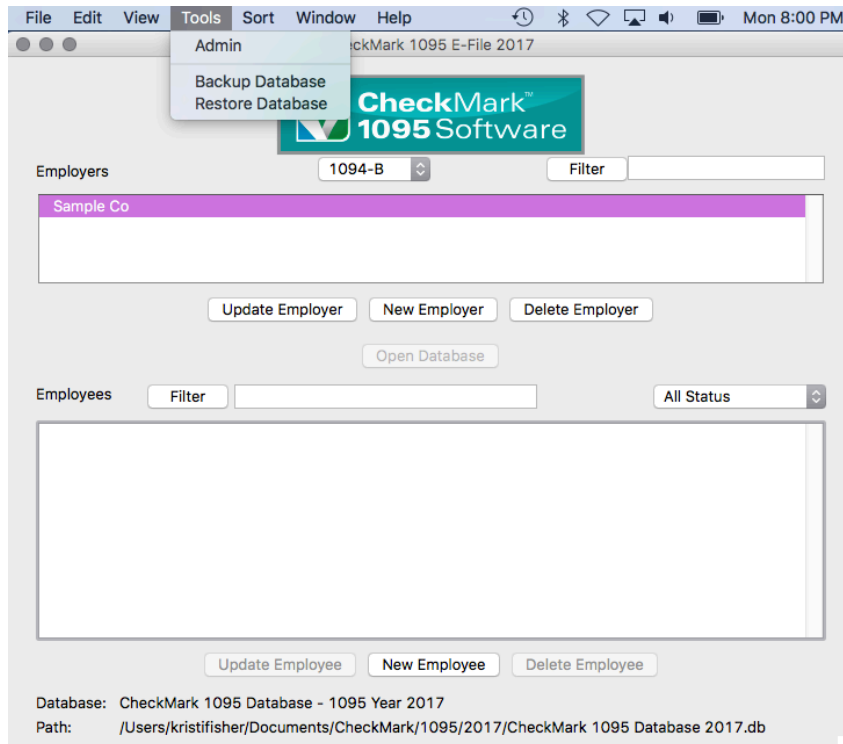
Chapter 4

Set Up

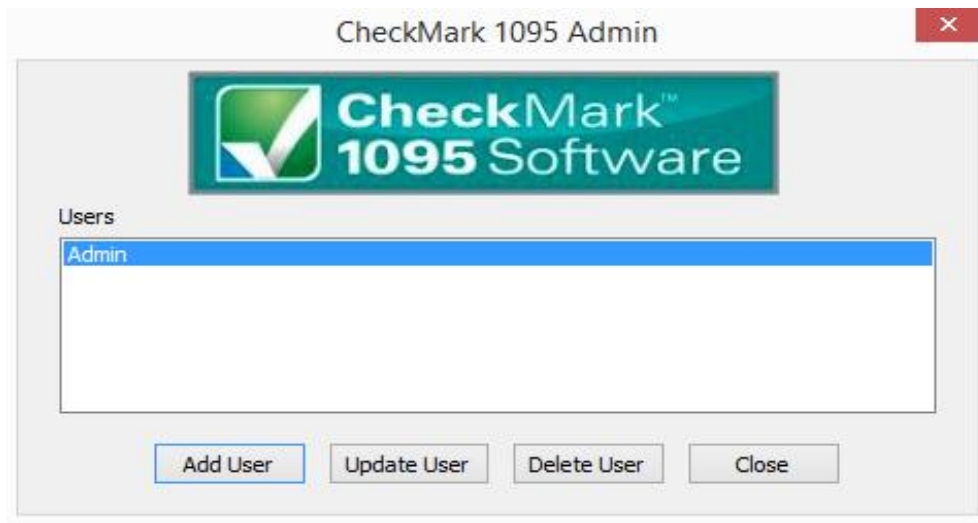
Setting up Users and Passwords

IMPORTANT: Although not required, it is recommended you set up a password to protect your private information

1. Click on the **Tools** menu in the menu bar and select **Admin**



- To create a new user click the **Add User** button.



- Enter the **Name** and **Password**.

Note: The Name and Password are case sensitive.

- Click the checkbox for **This user should be granted ADMIN privileges** if you want this user to be able to add, update or delete other users.

IMPORTANT: The first user set up will have **Admin** privileges. You cannot delete or change this user's **ADMIN** privileges until another user with Admin privileges is created.

Users with **ADMIN** privileges can add/delete/update other users, Backup and Restore the database and Check for updates.

User Details

CheckMark™
1095 Software

User Information

User Name

Password

Re-enter Password

This user should be granted ADMIN privileges

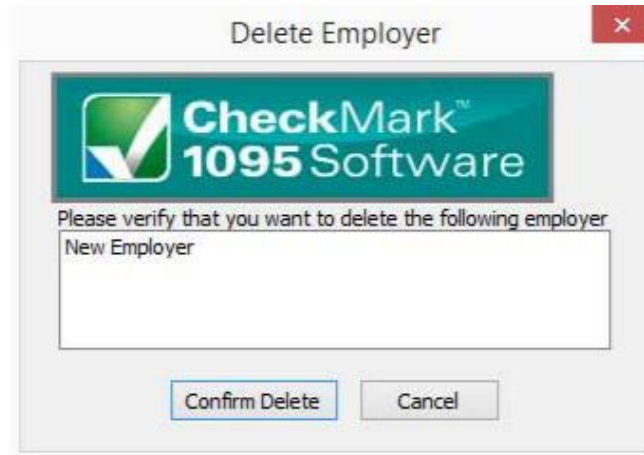
5. Click the **Add User** button to save.

Updating Users

1. Click on the **Tools** menu in the menu bar and select **Admin**.
2. Highlight the user you want to update from the list.
3. Click the **Update User** button.
4. Make the necessary changes and click the **Update User** button to save.

Deleting Users

1. Click on the **Tools** menu in the menu bar and select **Admin**.
 2. Highlight the user you want to delete from the list.
 3. Click the **Delete User** button.
 4. In the popup window, verify that the correct user name is selected and click the **Confirm Delete** button.
-



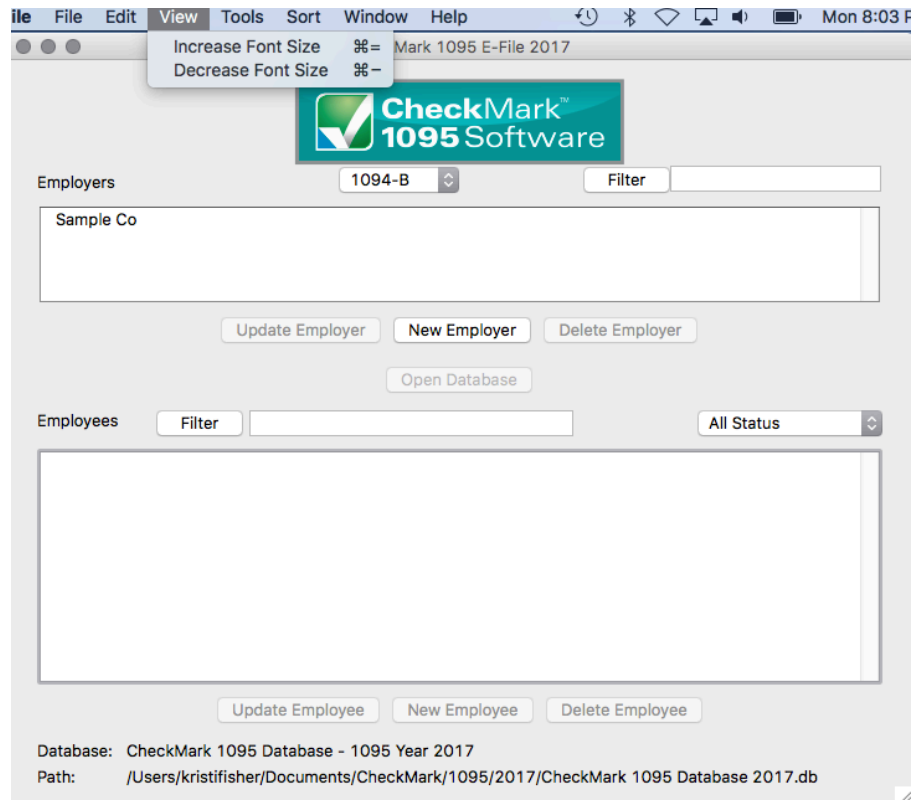
Note: If you delete all users, the software will not prompt for a password upon launching the program.

Setting Screen Font Size

This setting allows you to customize how big or small you want the font on the screen in the program. You can increase or decrease the font size as needed.

Selecting Font Size

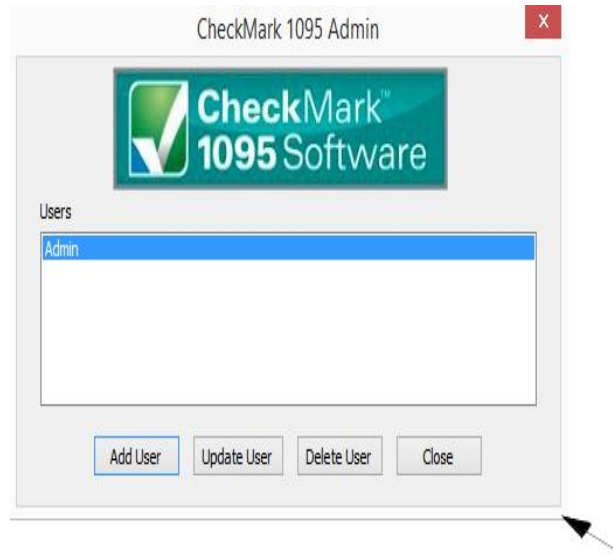
1. Click on the **View** menu in the menu bar.
2. Choose Increase Font Size to make the font larger, choose Decrease Font Size to make the font smaller.



Adjusting Screen Size

You can adjust the size of each screen to maximize or minimize your viewing area.

To increase or decrease the size of any screen, simply click and hold the mouse button on the lower right hand corner of any screen and drag the corner to the desired position.



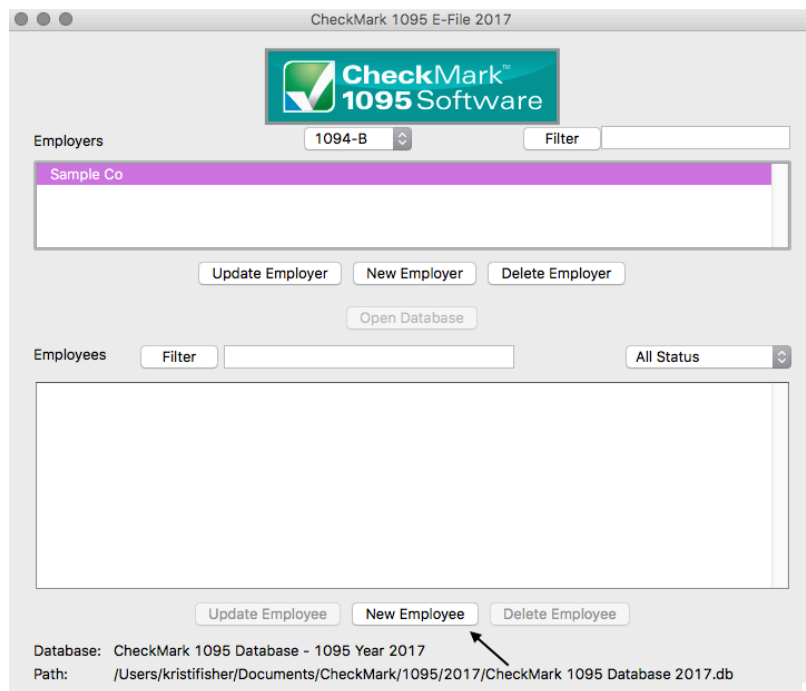
Chapter 5

Setting Up Employees

This chapter explains how to setup new Employees for each employer.

Creating New Employee

1. Open the Database that contains the employer to which you want to add employees. If no Database exists you must first create one. See “Create New Database” on page 9.
2. Select an Employer from the list. If no Employers are listed, you must first set up an employer before adding employees. For information on setting up a new employer, see “Creating a New Employer” on page 14.
3. Click the **New Employee** button.



The list of fields for the new employee corresponds to the same fields found on the 1095 forms

4. Choose which type of 1095 form this employee should receive and click **OK**.

Employee General Details

CheckMark 1095 Software

VOID CORRECTED OMB No. 1545-2252 2015 Form 1095-B

General Information Covered Individuals

Responsible Individual

1. Name

2. SSN

3. Date of Birth (If SSN is not available)

4. Street Address

5. City

6. State

7a. Country

7b. Zip

8. Enter letter identifying Origin of the Policy:

9. Small Business Health Options Program (SHOP) Marketplace Identifier, if applicable

Employer self-insured group health plan coverage

Employer Sponsored Coverage

10. Employee Name Sample Co.

11. EIN 24-1234567

12. Street Address 133 Retail Road

13. City Fort Collins

14. State CO

15a. Country US

15b. Zip 80513

Issuer or Other Coverage Provider

16. Name Anthem Blue Cross Blue Shield

17. EIN 11-1111111

18. Contact Telephone Number 970-222-2222

19. Street Address 123 Anthem Way

20. City Fort Collins

21. State CO

22a. Country US

22b. Zip 80556

Update Employee Add Employee Cancel

5. Enter the **Employee's SSN** along with the **Employee's Information**. Do not enter the Date of Birth unless the SSN is not available.
6. Fill in any fields that are applicable for the employee.
7. Click the **Add Employee** button to Save the information.

If any information is invalid, a popup window will open explaining which fields have errors.

Error

CheckMark 1095 Software

The following errors were discovered:

Employee's ID: Must be of form XXX-XX-XXXX.

Employee's Country: Must be between 1 and 15 characters and it should not have any numerics.

Any of the 12 months or All months Offer of Coverage must have value from '1A' to '1I'.

Any of the 12 months or All months Emp Share must have value greater than 0.00 if Any of the Offer Coverage is either '1B', '1C', '1D', '1E'.

Continue Anyway Cancel

Press **cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the employee information

NOTE: If any field has an invalid entry, once you return to the Employee set up screen, that field name will show up in “**Red**”. In addition, some fields will not save the invalid information and remain empty. For more information on validated information, see “Validated Status” on page 32.

Updating an Existing Employee

1. Select the employer that contains the employee(s) you wish to update.
2. Highlight the employee in the list you wish to update and click **Update Employee** button.
3. After all changes have been made to the **Employee Information**, click **Update Employee** button to save changes.

Voided Employee

If a 1095 is incorrectly filed, or included in a filing, that was incorrectly filed, you can resubmit the 1095 as a Voided copy to void the original 1095 to the IRS. Please read the IRS Instructions on how to file this.

1. Select the employee from the list and click **Update Employee** button
2. Click the **Void** check box at the top of the screen.

If the employee’s Status is already considered **Printed** and/or **Completed**, you’ll receive a pop up window asking if you would like to change the status back to Not Printed and/or Not Completed. For information on what the different Statuses mean, see “Status” on page 31.

3. Mark the corresponding checkbox next to “**NOT Printed**” and/or “**NOT Complete**” if you want to change the status and click the **Save and Continue** button. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated employee information without changing their status.

If you initially printed the form, reprint another 1095 with the updated **Void** status and submit that form to the IRS with a new 1094 form. for instructions on printing 1095 forms, see “Printing 1095s for Employees” on page 48.

If you initially e-filed, create a new .txt file with that employee and updated **Void** information and submit it to the IRS. For information on e-Filing, see “Creating a file to eFile” on page 54.

Corrected Employee

If a 1095 is filed, or included in a filing, with incorrect information, a **Corrected** 1095 must be filed with the IRS.

1. Select the employee from the list and click the **Update Employee** button.
2. Click the **Corrected** check box at the top of the screen, update any information and click the **Update Employee** button to Save.

If the employee's Status is already considered **Printed** and/or **Completed**, you'll receive a pop up window asking if you would like to change the status back to **Not Printed** and/or **Not Completed**. For information on what the different Statuses mean, see "Status" on page 31.

3. Mark the corresponding checkbox next to "**NOT Printed**" and/or "**NOT Complete**" if you want to change the status and click the **Save and Continue** button. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated employee information without changing their status.

If you initially printed the form, reprint another 1095 with the updated **Corrected** status and submit that form to the IRS with a new 1094. for instructions on printing 1095 forms, see "Printing 1095s for Employees" on page 48.

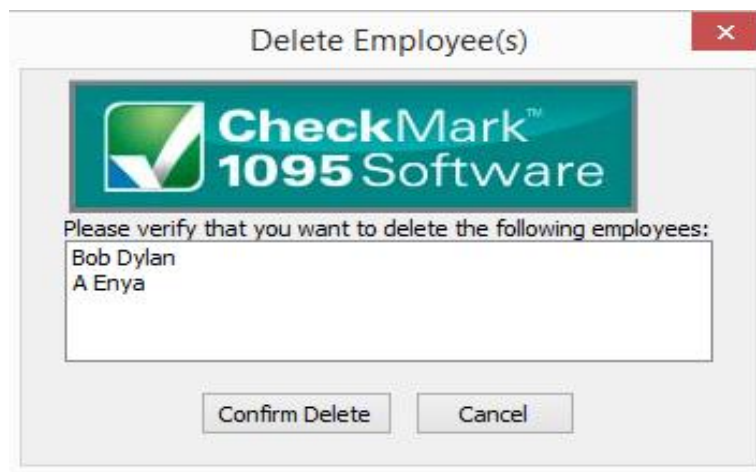
If you initially e-Filed, create a new .txt file with that employee and updated Corrected information and submit it to the IRS. For information on eFiling, see "Creating a file to eFile" on page 54.

Deleting an Employee

1. Select the employer that contains the employee(s) you wish to delete
 2. Highlight the employee in the list you wish to Delete.
-

If you want to delete more than one employee, you can highlight multiple employees at once. See “Selecting Multiple Employees” on page 33.

3. Click **Delete Employee** button.
4. A pop-up window appears to confirm that these are the employees you want to delete.
5. Click **Confirm Delete** to complete the process.



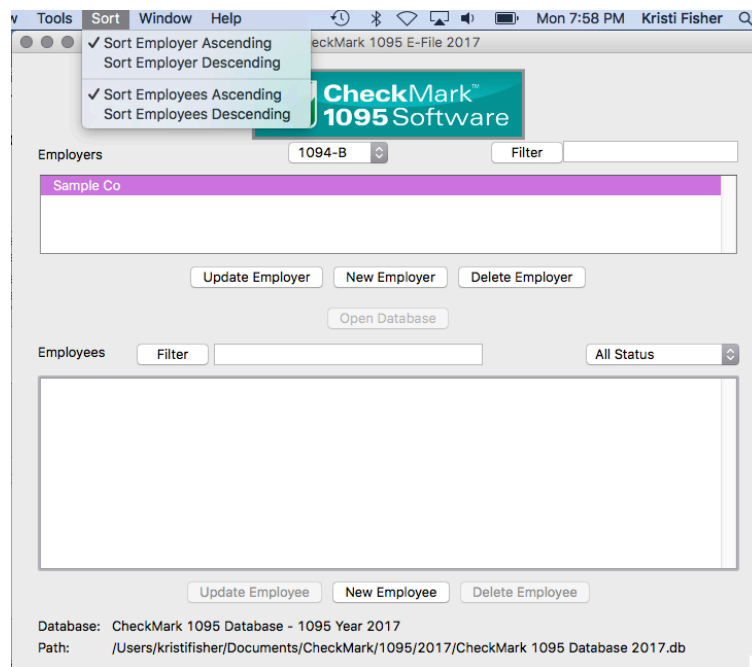
Filtering Employees

You can use the **Filter** button to search for certain employees in the list. To find a particular employee, enter all or part of the name into the **Filter** box area above the employees section and click the **Filter** button. The Filter will search for any employees that contain those variables.

You can also use an asterisk(*) to help sort groups. For instance, if you enter the first letter and then an asterisk, ex: N*, you will receive all employees that start with the letter “N”.

Sort Employees

You can sort employees by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Employees Ascending** or **Sort Employees Descending**.



Status

The **Status** drop down menu has certain statuses that are categorized based upon their setup and completion of being printed. You can sort using the different options to see which employees or vendors have been **Printed, Completed, Validated, Voided, or Corrected**.

Employees can be in multiple statuses at the same time, however you can only sort by one status at a time.

NOTE: Before choosing a **Status**, you should first select one in the list.

The screenshot displays the 'CheckMark 1095 E-File 2017' application window. At the top center is the 'CheckMark 1095 Software' logo. Below the logo, the 'Employers' section features a dropdown menu set to '1094-B', a 'Filter' input field, and a list containing 'Sample Co'. Below this list are buttons for 'Update Employer', 'New Employer', and 'Delete Employer', along with an 'Open Database' button. The 'Employees' section below has a 'Filter' input field and a dropdown menu set to 'NOT Completed'. The employee list includes 'Dylan, Robert', 'Jagger, Mick' (highlighted in purple), and 'Jett, Joan'. Below the list are buttons for 'Update Employee', 'New Employee', and 'Delete Employee'. At the bottom, the database information is shown: 'Database: CheckMark 1095 Database - 1095 Year 2017' and 'Path: /Users/kristifisher/Documents/CheckMark/1095/2017/CheckMark 1095 Database 2017.db'.

Printed Status

You can easily sort using this status to see which employees still need the form 1095 printed.

You can select either **Printed** or **Not Printed** status to sort for employees by whether or not you have printed a 1095 for them. Once you select the **Print Forms for Employee** command from the **File** menu, that employee will automatically be moved to the **Printed** status from the **NOT Printed** status.

Completed Status

You can use the **Completed** status to indicate which employees have or have not been printed or e-Filed this form 1095 for employer related copies.

Once you select the **Print forms for Filing** option under the **File** menu, employees listed under **NOT Completed** will be moved to the **Completed** status.

Validated Status

Sorting by **Validated** or **NOT Validated** helps you easily determine if there is any employee that is not set up correctly. In the employee screen, certain fields require specific characters, numbers, etc. to be accepted upon filing.

Select **Validated** to see which employees are ready to be filed. Select **NOT Validated** to see any employees that have set up criteria which is incorrect for filing purposes. Once you have sorted by **NOT Validated**, select an employee and click on the **Update Employee** button to view the set up and make necessary changes. Fields marked in “**RED**” do not meet the requirements for filing and corrections should be made.

Voided Status

In the Employee set up screen, there is a checkbox at the top of the screen for **Void**. If you filed a 1095 for an employee that was unintended, you can mark **Void** to resent the 1095 for that employee as a void status.

Choosing a **Voided** status will list all employees marked **Void** in the Employee set up screen. All other employees that are not marked **Void** in the employee set up screen are listed as **NOT Voided** for a status.

Corrected Status

In the Employee set up screen, there is a checkbox at the top of the screen for **Corrected**. If you filed an incorrect 1095 and need to resubmit a new 1095 with updated information, select the **Corrected** checkbox in the employees set up screen before submitting the new 1095 information.

The **Corrected** status indicates all employees who are marked as **Corrected** in the employee set up screen. All other employees will be listed as **Not Corrected**.

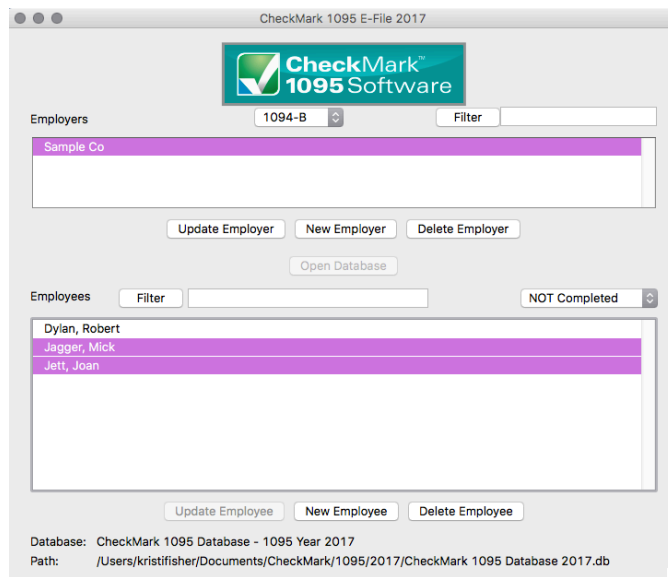
Selecting Multiple Employees

Consecutive Selection

Windows: You can select multiple employees by clicking the first employee while holding down the mouse and moving the mouse down through the list

You can also click the first employee, hold down the 'SHIFT' key on the keyboard and then click on the last employee you want in the list.

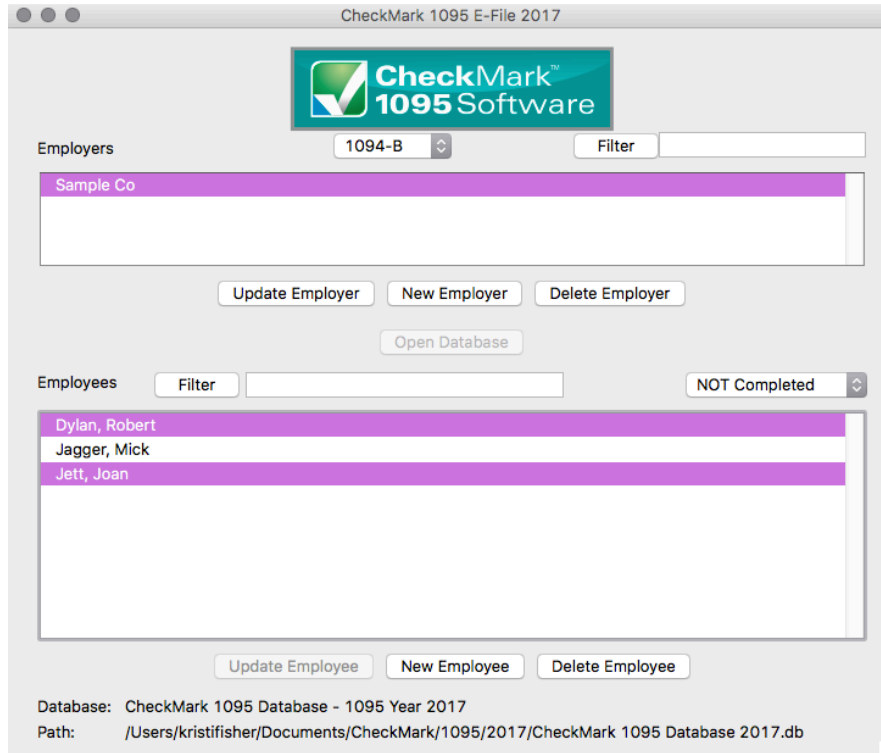
Macintosh: Click on the first employee you want in the list, hold down the 'SHIFT' key on the keyboard and then click on the last employee you want in the list



Non-Consecutive Selection

Windows: To select specific employees as a group, click on the first employee you want, hold down the 'CTRL' key on the keyboard and click on any other employees you want to include.

Macintosh: To select specific employees as a group, click on the first employee you want, hold down the 'COMMAND' key on the keyboard (also known as the Apple key) and click any other employees you want to include.



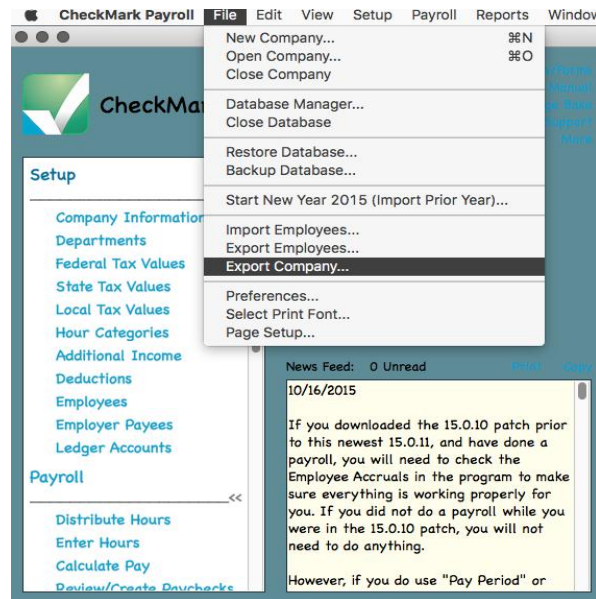
Chapter 6

Exporting and Importing

This chapter explains how to export employees and companies from CheckMark Payroll as well as companies from CheckMark MultiLedger and how to import this information from CheckMark Payroll, MultiLedger or tab-delimited text file.

Exporting Company Information From CheckMark Payroll

1. Open CheckMark Payroll, then open the employer you wish to export.
2. Under the **File** menu select **Export Company**.



3. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.
4. Click **Save**.

Exporting Company Information from MultiLedger

1. Open the MultiLedger program, under the File menu select **Export Company...**



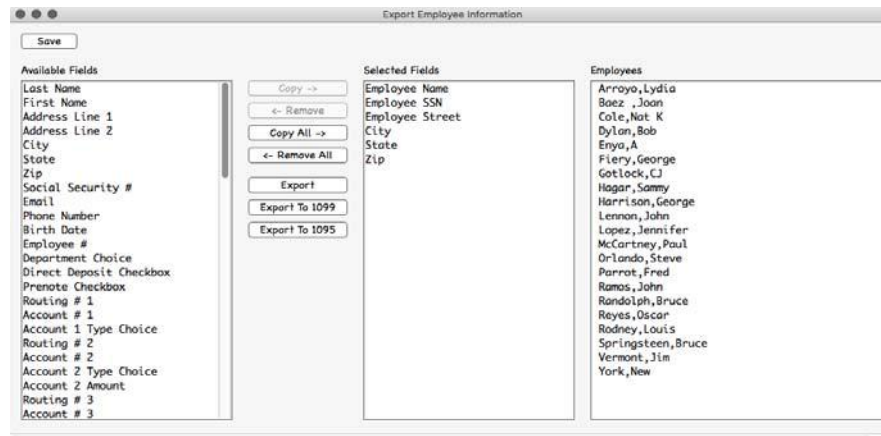
2. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your desktop.
3. Click **Save**.

Exporting Employees from CheckMark Payroll

1. Open CheckMark Payroll, go under File menu and choose Export Employees
2. Highlight which employees you want to export from the list.

Note: If the employees to be imported are using different types of 1095 forms, you should create an export file for each type of form. Example, one export file for 1095-B, and one file for 1095-C.

3. Click the **Export 1095** button. The **Selected Field** list will automatically populate with the correct available fields to import into the 1095 software.



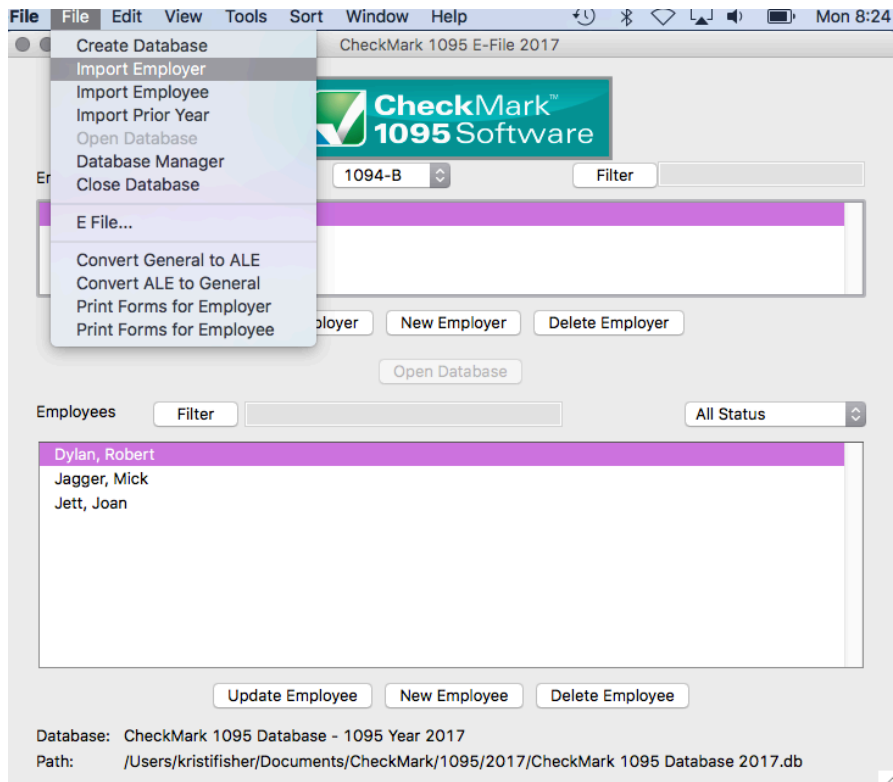
4. A **Save** dialogue box appears in the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.
5. Click **Save**.

Importing Employer Information from CheckMark Payroll or MultiLedger

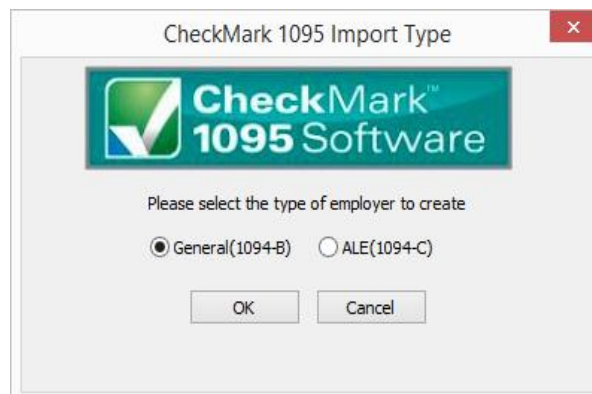
1. Open the CheckMark 1095 application.
2. Open the Database you want to import the employer into.

Note: If the database that you want to import employees to does not exist, you will need to create a new database before importing. For information on creating a new database see “Creating a New Database” on page 9.

- Under the **File** menu select **Import Employer**.

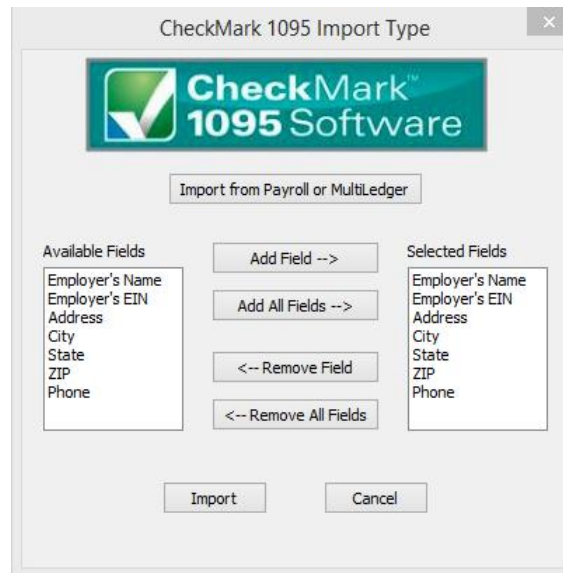


- Choose the type of employer you are importing.



- Click **OK**

6. Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically populate for you.



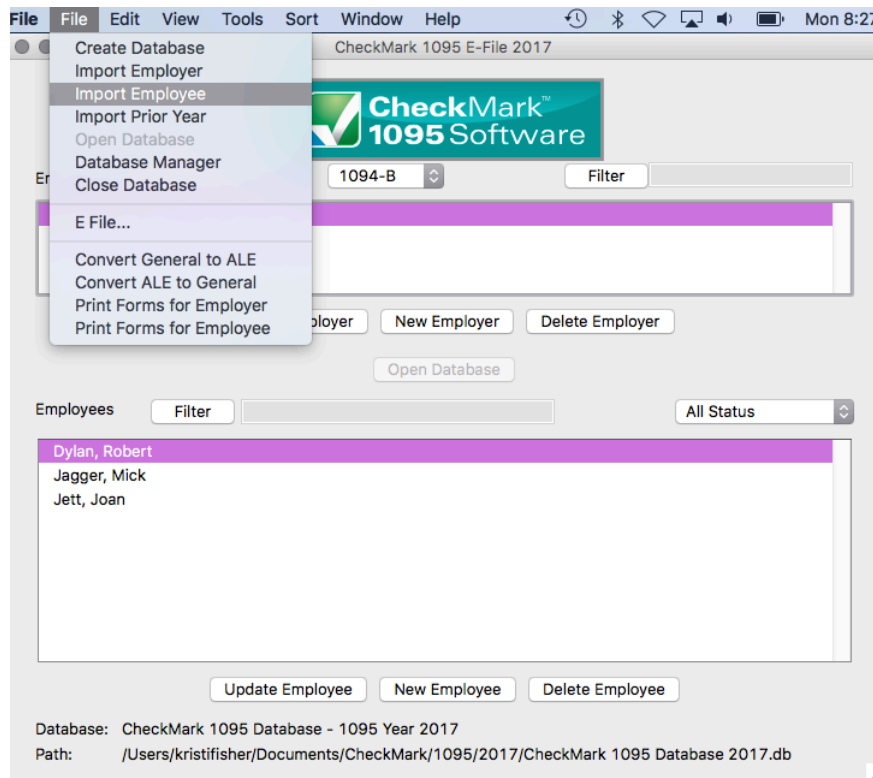
7. A dialogue box appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.
8. Select the text file and click **Open**. The employer will be imported into the selected database.

Importing Employees from CheckMark Payroll and MultiLedger.

1. Open the CheckMark 1095 application.
2. Open the Database which contains the employer you want to import into.
3. Select 1094-B or 1094-C depending on which type you will be importing.
4. Select the employer you want to import employees for.

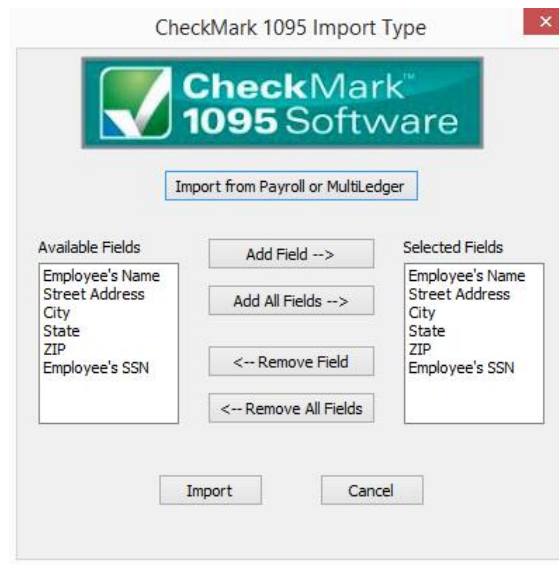
Note: If the employer you want to import employees to does not exist, you will need to create a new employer or import a employer before importing employees. For information on creating a new employer or importing a employer, see “Creating a New Employer” on page 14 or “Importing an Employer” on page 38.

5. Under the **File** menu select **Import...**



6. Select **Import Employee** in the popup window.

7. Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically populate for you.



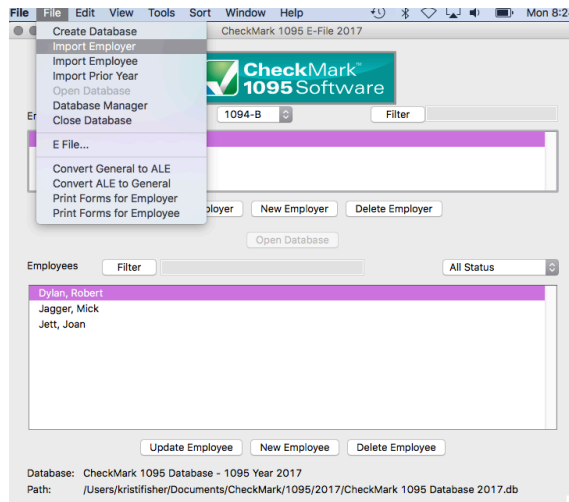
8. A dialogue box appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.
9. Select the text file and click **Open**. All employees will be imported into the selected employer.

Importing using a tab-delimited text file.

1. Open up the CheckMark 1095 application.
2. Open the Database which contains the employer you want to import into.

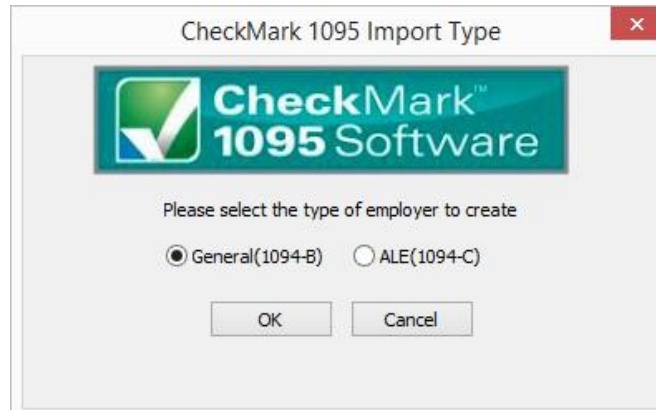
Note: If the employer you want to import employees to does not exist, you will need to create a new employer or import an employer before importing employees. For information on creating a new employer or importing an employer, see “Creating a New Employer” on page 14 or “Importing an Employer” on page 38.

3. Go under the **File** menu and select **Import...**

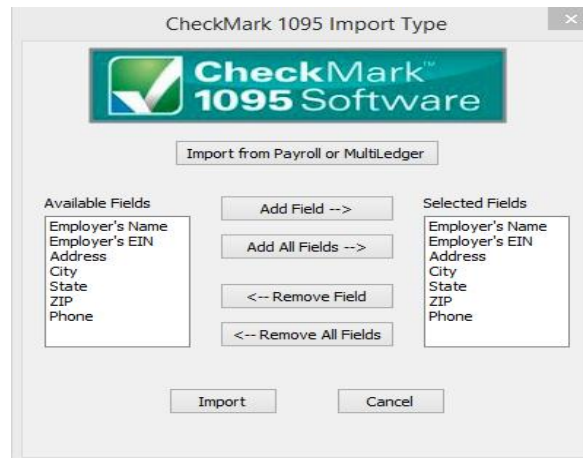


4. Select **Employee** or **Employer** in the popup window.

- If you chose Employer, in the popup window select which type of 1095 employer you are importing: **1094-B** or **1094-C**.



- The import screen allows you to select which fields are being imported. Select the fields in the same order as the text file you're importing. Click the **Import** button after you have added all fields to the **Selected Field list**.



- An Open Dialogue box appears allowing you to browse to the location where you saved your text file.
- Select the text file and click **Open**.

Text File Format for Importing

CheckMark 1095 program uses a tab-delimited .txt file for importing Companies and the Employees.

Each field is separated by a **Tab** with **Return** at the end of the record before starting the next employee. An example of a text file to be imported is shown below and contains the **Selected Fields:** *Employer Name/Last Name (required), First Name, Address 1, Address 2, City, State, Zip, Employees ID.*

```
Power[tab]Max[tab]44 Main St[tab]Ste 101[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]
```

- If any fields are not applicable, for instance the address 2 field, a space can be used as a place holder. For example:

```
Power[tab]Max[tab]44 Main ST[tab]"space"[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]
```

- If no space is included, two consecutive [tabs] will also work. For example:

```
Power[tab]Max[tab]44 Main St[tab][tab]FortCollins[tab]CO[tab]80525[tab]123-45-6789[return]
```

IMPORTANT: Make sure the items in the **Selected Fields** list are in the same order as the items in the text file being imported to ensure that all values are imported into the correct fields

Chapter 7

Printing 1094 and 1095 Forms

This chapter explains how to print 1095 forms for the employer and each employee and the 1094 form you will submit to the IRS.

While CheckMark Inc. attempts to maintain up-to-date information, we cannot be responsible for changes or discrepancies in forms that are filed incorrectly.

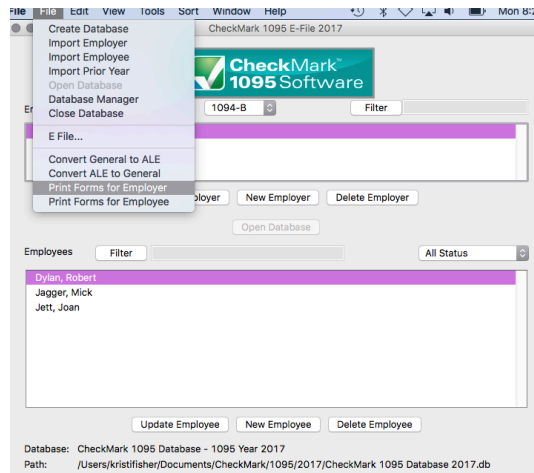
IMPORTANT: You must install the latest version of Adobe Reader to print 1094-1095 forms properly. Go to www.adobe.com to download the latest update.

Print 1094 and 1095 Forms for Each Employer

1. Select which type of 1094 form you want to print from the drop down menu: 1094-B or 1094-C.
2. Select the employer you wish to print 1094 and a 1095 forms.
3. Select which employee(s) in the list you would like to print forms for. If no employees are selected, all employees will be included.

Note: You can sort the employees by using the Status drop down menu to group employees by **Printed, Completed, Validated, Corrected, and Void**. For more information on using the Status drop down menu and what each Status means, see “Status” on page 31.

4. Under the **File** menu, select the **Print Forms for Employer** option.



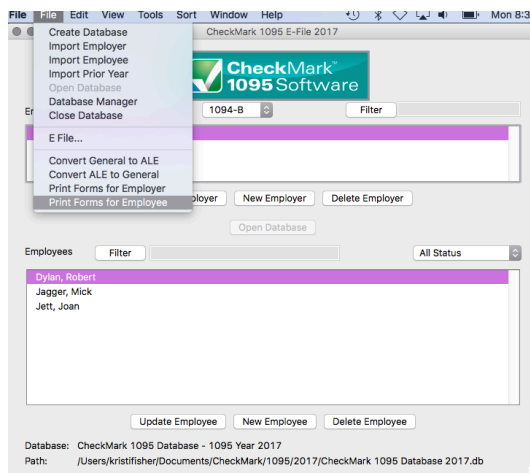
This will bring up the print dialog. You can print to PDF to verify the information before printing the forms or just print the forms. The 1094-B is the Transmittal of Health Coverage Information Returns. This gets sent with the IRS copies of the 1095-B forms for each employee.

Printing 1095s for Employees

1. Select which type of 1094 form you want to print from the drop down menu: 1094-B or 1094-C.
2. Select the employer you wish to print 1094 and a 1095 forms.
3. Select which employee(s) in the list you would like to print forms for. If no employees are selected, all employees will be included.

NOTE: You can sort the employees by Status drop down menu to group employees as **Printed, Completed, Validated, Corrected and Void**. For more information on using the Status drop down menu and what each Status means, see “Status” on page 35.

4. Under the **File** menu, select the **Print Forms for Employee** option.



NOTE: If a security warning appears click allow for the form to open in Adobe Acrobat

5. This will bring up the print dialog. You can print to PDF to verify the information before printing the forms or just print the forms.
-

Chapter 8

eFile

This chapter shows you how to eFile 1095 forms using the IRS ACA Information Returns (AIR) Program. If you have never eFiled 1095s in the past, You will need to visit the IRS website at www.irs.gov to sign up for an AIR system account and receive a Transmitter Control Code (TCC), You should do this 45-60 days before the filing deadline.

While CheckMark Inc. attempts to maintain up-to-date and accurate form information, we cannot be held responsible for changes or discrepancies in forms that are filed incorrectly.

NOTE: The ability to eFile is only available to customers who have purchased the 1095 eFile version. If you need to upgrade from the printed version, call 1-800-444-9922 or visit the CheckMark website at www.checkmark.com.

Creating a file to eFile

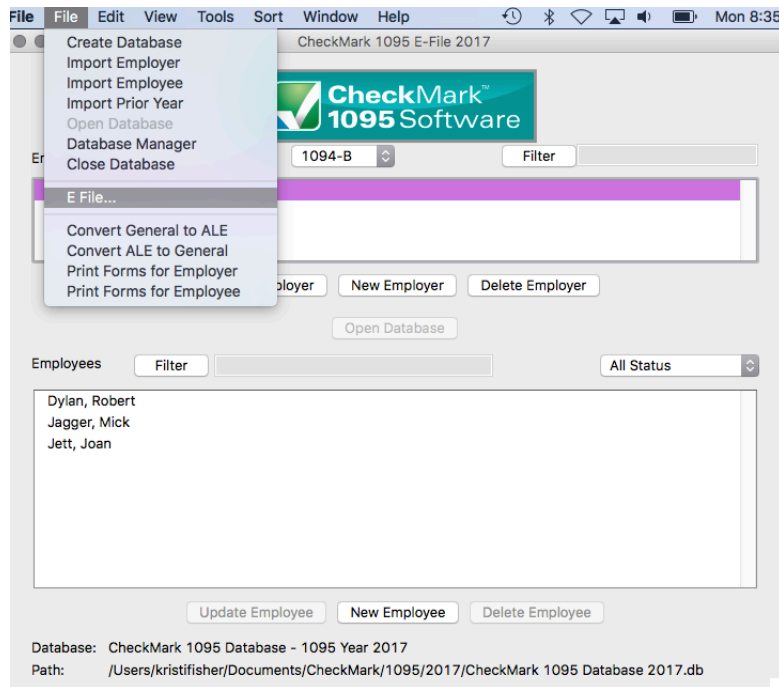
Before creating your first live -e-file to be submitted you must complete a communication test.

1. Select the employer you want to eFile for.
 2. Select the employees you wish to include. You can sort using the different forms or choose **All Forms** from the drop down menu to select all employees. For information on selecting multiple employees, see “Selecting Multiple Employees” on page 33.
-

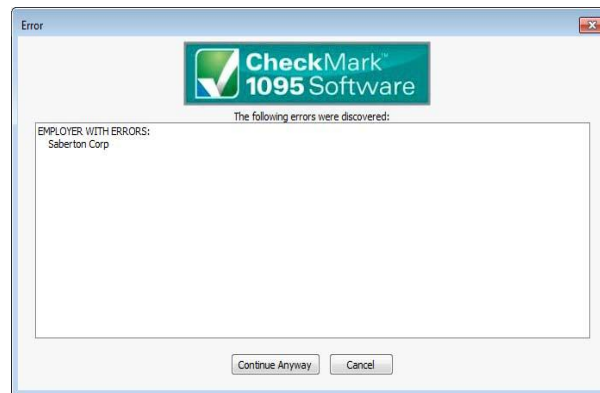
NOTE : If you do not choose any employees, the eFile option will not be available.

You can sort the employees by the Status drop down menu to group employees as **Printed, Completed, Validated, Corrected** and **Void**. For more information on using the Status drop down menu and what Status means, see “Status” on page 31.

- From the **File** menu, choose **eFile...**

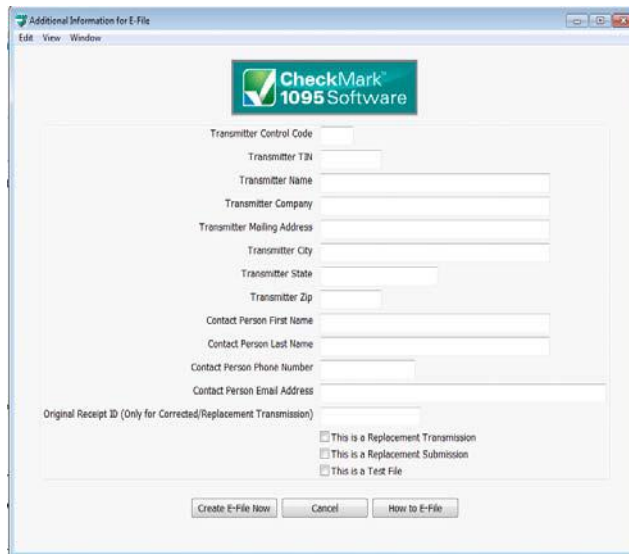


- If there are any issues with the the forms a popup screen will appear stating where the errors are.



- Click cancel to go back and correct there errors. If you feel this box is incorrect then click continue anyway to contiuue with creating your e-file.

6. In the pop-up window. Fill in all applicable fields.

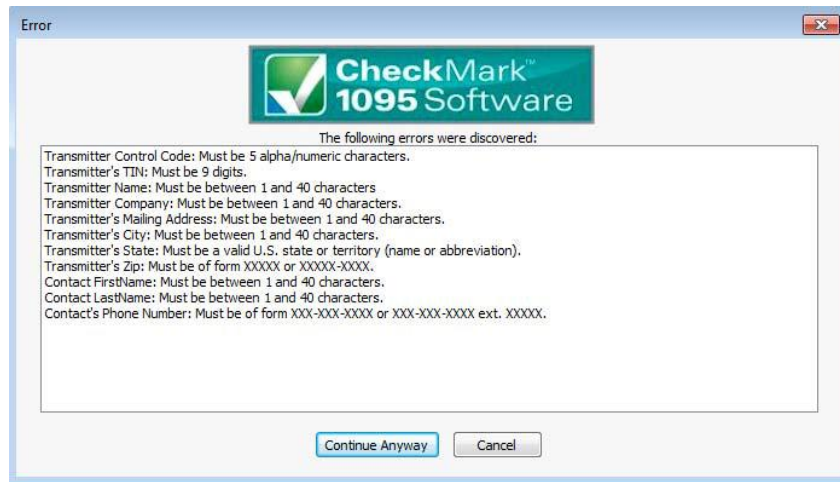


7. *Optional:* If you need more information on how to set up an E-file account, Click the **How to E-file** button. A pop-up window with important links on how to first apply, create a AIR system account.

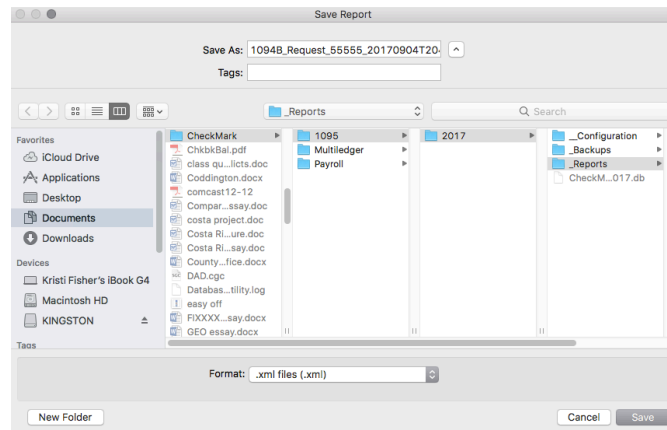


8. Once all the information is filled in, click the **Create E-File Now** button.
-

- If there are any errors in the transmitter information window, you will see a pop-up window explaining what errors occurred.



- Click **Cancel** to go back to the transmitter information window to correct any set up errors. Or click **Continue Anyway** to proceed with saving the .txt file.
- A **Save as** dialog box opens. you will save 2 files. One is a manifest file and the other is a form file.



12. Use the default name. Save the file to a location that is easy to find. The Desktop is an easy location to save the file to and find it there later when you are ready to submit the file to the IRS AIR system. Click **Save**.

NOTE: Keep both files together in same location so the manifest file is with it's corresponding form file to prevent errors.

Corrected/Replacement Transmission

1. After making corrections (if doing the corrected transmission), you need to mark those sections you fixed as corrected. If the fix was for an employee, please make sure you check the Corrected box at the top of the screen when you Update the Employee. If you are a C company, you also need to go to the Update Employer section on the 1094-C and select the corrected box. B companies do not have this option under the Update Employer option, so B companies can ignore the employer step, but make sure to check the Corrected box in the Update Employee screen. Marking corrected can be ignored for replacement transmissions, however in the E-file window there is a specific check box that needs to be selected toward the bottom of the screen to indicate what type of Transmission is happening.... your options are Replacement Transmission, Replacement Submission, and Test File.

Additional Information for E-File

Edit View Window

CheckMark
1095 Software

Transmitter Control Code

Transmitter TIN

Transmitter Name

Transmitter Company

Transmitter Mailing Address

Transmitter City

Transmitter State

Transmitter Zip

Contact Person First Name

Contact Person Last Name

Contact Person Phone Number

Contact Person Email Address

Original Receipt ID (Only for Corrected/Replacement Transmission)

This is a Replacement Transmission

This is a Replacement Submission

This is a Test File

Create E-File Now Cancel How to E-File

2. When you originally submitted your 1095 you would have been sent a Receipt ID confirmation from the IRS. You will need to have the Receipt ID when creating the "Corrected e-file/Replacement Transmission".
3. Go to the File menu and select E-file like you normally would. However, when the pop up window opens for you to enter all the transmitter information you will see at the bottom of this page, a field for "Original Receipt Id", enter this for the corrected/replacement form submission. You need to enter the "Original Receipt Id" that you received after submitting the original files

Additional Information for E-File

CheckMark[™]
1095 Software

Transmitter Control Code

Transmitter TIN

Transmitter Name

Transmitter Company

Transmitter Mailing Address

Transmitter City

Transmitter State

Transmitter Zip

Contact Person First Name

Contact Person Last Name

Contact Person Phone Number

Contact Person Email Address

Original Receipt ID (Only for Corrected/Replacement Transmission)

This is a Replacement Transmission

This is a Replacement Submission

This is a Test File

Create E-File Now Cancel How to E-File

4. Save the E-Files and resubmit

Chapter 9

Backup and Restore

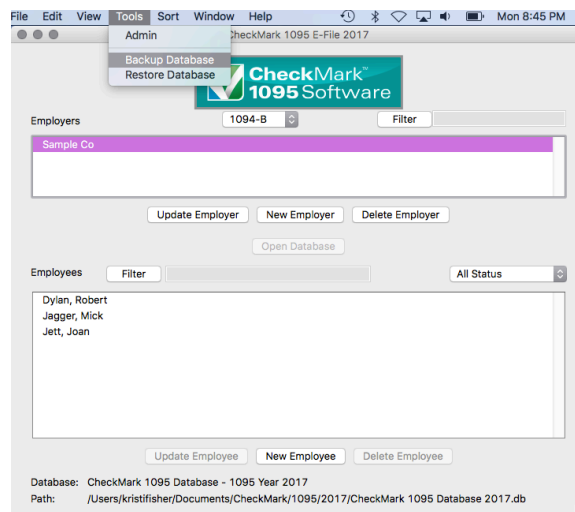
Making backups is critical to protecting your data. You should always keep current backups. CheckMark 1095 allows you to easily backup your data to any external source for safekeeping.

Backing Up Using the Backup Database Command

Using the **Backup Database** command within the program allows you to backup a duplicate copy of the database. You can restore this database in case of computer failure or to revert back to a previous database in case of an error in your current database. It is recommended that you make current backup databases anytime you modify information.

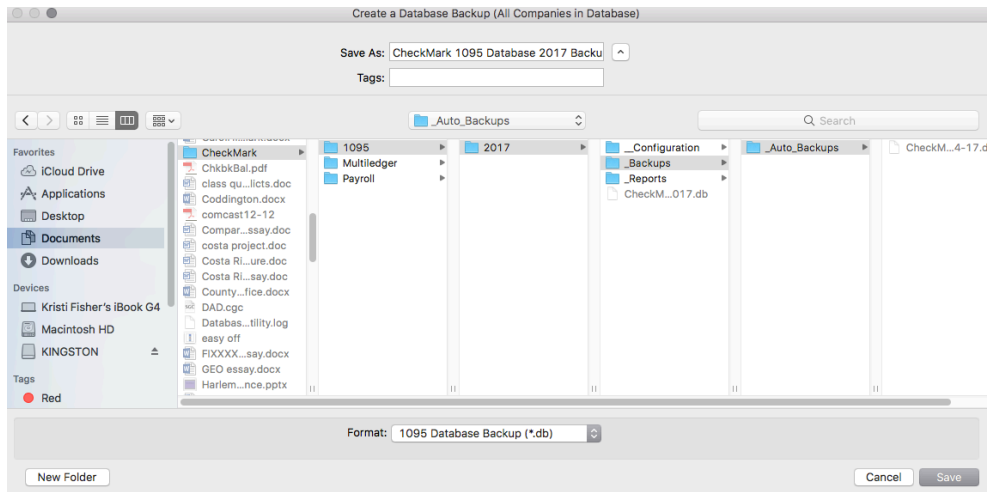
NOTE: Only users with **Admin privileges** can backup and restore a database. For more information on setting up Admin privileges, see “Setting up Users and Passwords” on page 18.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Backup Database**.



2. A **Save In** dialog box appears. Choose a destination you would like to save the backup database to.

3. A default name of **backup (with the current date).db** is given. Change the name of the backup if you wish and leave the .db extension.

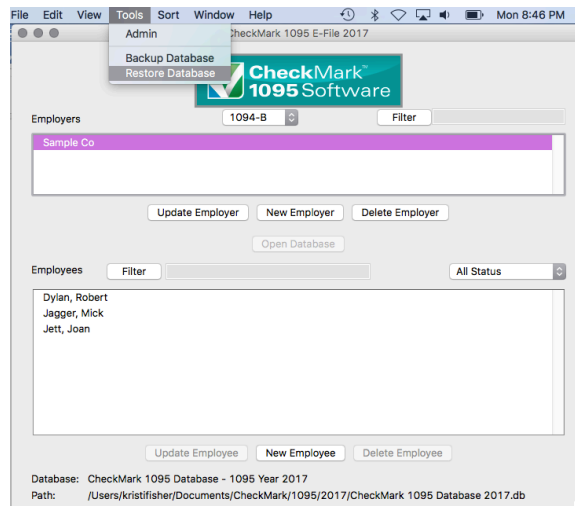


4. Click **Save**.

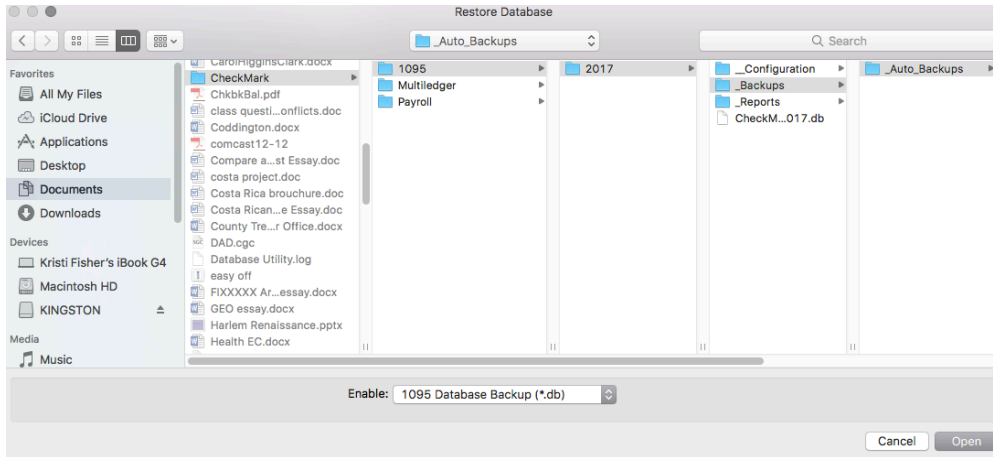
Restoring Database using Restore Database Command

In case of computer failure, corruption or if you made a mistake and would like to revert back to a previous database, the **Restore Database** command will open any previous backups you have saved.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Restore Database**.



2. A Dialogue box opens. Browse to the location of the Backup Database file.



3. Select the file and click **Open**.

Important: Restoring a database file will **overwrite the existing .db file**. Restoring a database file is used in cases of the current file becoming damaged or information being entered incorrectly into the current database. Restoring from a previous database is faster than manually updating the incorrect information.
