CheckMark 1095

**User's Manual** 



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 multiuser 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 8 or higher including Windows 10 & 11, or Macintosh OS X 10.6 or higher including Sierra, Mojave, Catalina, Big Sur, Monterey, & Ventura.

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 at <u>kb.checkmark.com</u>.

#### Contacting CheckMark

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

Online at: https://www.checkmark.com

Sign in to **My Account** using your credentials. Click on "**Support**" and Select "**Add Ticket**". Fill in all the necessary fields and click **Submit** to create a support ticket.

Once your ticket is submitted, you will receive a notification on your registered email address. Our support team will now take care of your query and update you on the ticket. You can view your submitted tickets in Support > Ticket History in **My Account**.

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 doubleclick 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, doubleclick 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 Message** button to print out this information.

000	Important Information
	nportant Information CheckMark 1095 for 2022
Thank you fo	r purchasing CheckMark 1095 for 2022!
	e, we are waiting for some of the updated forms for the 2022 tax year from the IRS. As soon as information from them, you will be notified that a patch is available.
	me, you can get your Employer and Employee information setup so you will be ready to go as ew forms are available.
lf you will be	filing electronically, please read the information below.
Requirements	for filing with AIR (IRS)
If you wish to the returns.	file your 1095s electronically, you will need to register at least 45 days before the due date of
• Copy & past Control Code	te the link below to get access to the information on how to Register and obtain a Transmitter (TCC).
Print Message	Copy Message
	Continue
	Continue

**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)

- 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 doubleclick 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.

Name Kris Password ••••	10	95 Sc	/lark <sup>™</sup> oftvvare
Password	Name	Kris	
	Password	••••	

- 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.

			Database Manager		
1095 Year	Database Name				Help
* 2022		1095 Databas	e		
			2 ·		
Path /llcon	s/chackmark/Doc	ments /CheckM	lark/1095/2022/CheckMar	1005 Database 2022	dh
		americs/ checkin	ur k/ 1055/2022/ Checkmur	k 1095 Dulubuse 2022.	ub
* currently o	pen				
Cre	ate New Database		Add Database to List	Find Databas	es
R	ename Database		Move Database	Remove from	List
		Open Databa	se Close Database	Manager	

### **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.

Create Database	
CheckMark 1095 Database   (Don't include	le year in name)
2022	
/Users/checkmark/Documents/CheckMark/1095/2022/	Choose Directory
/Users/checkmark/Documents/CheckMark/1095/2022/CheckMark 1095 Database	2022.db
Cancel Create Database	
	CheckMark 1095 Database (Don't include 2022 /Users/checkmark/Documents/CheckMark/1095/2022/ /Users/checkmark/Documents/CheckMark/1095/2022/CheckMark 1095 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

0.0			Data	base Mana	ager				
095 Year	Database Name								Help
* 2022	CheckMark	1095 D	tabase						
oth Misses				11 005 /202	7 //	Lask 100	5 0-4	202	
	s/checkmark/Doc	cuments	CheckMark/	1095/202	2/Check№	lark 109	5 Dat	abase 202	2.db
currently o	pen	cuments				lark 109	5 Dat		
currently o		cuments,		'1095/202 d Database		lark 109	5 Dat	abase 202 Find Datal	

- 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:

Print         Copy         Other users accessing this database from different computers will need to re-locate this database after renaming or moving. If the database is being accessed by multiple users, please follow these instructions to successfully modify this database file and re-locate it on other computers will need to re-locate this database.         Copy       (1) Exit CheckMark 1095 all other computers that access this database.         (2) Continue modifying the database file from this computer.       (3) For each computer that accesses this database, complete the following steps:         (4) Launch CheckMark 1095 and open the Database Amanger from the 'File'menu.       (5) Select the following database 3"         (6) Click 'OK' when informed that 1095 is unable to locate the database.       (7) Click the Locate Database 3"         (6) Click 'OK' when informed that 1095 is unable to locate the database.       (7) Click the FileDialog to find the modified database file.         (9) Click 'Open' to finish re-locating the database.       (9) Click 'Open' to finish re-locating the database.		If you are the only one who accesses this database, you may safely continue renaming or moving the database	
Print       or moving. If the database is being accessed by multiple users, please follow these instructions to successfully modify this database file and re-locate it on other computers:         (1) Exit CheckWark 1095 all other computers that access this database.         (2) Continue modifying the database file from this computer.         (3) For each computer that accesses this database, complete the following steps:         (4) Launch CheckMark 1095 and open the Database Manager from the 'File'menu.         (5) Select the following database of the Database List:         "CheckMark 1095 Database 3"         (6) Click 'OK' when informed that 1095 is unable to locate the database.         (7) Click the 'Locate Database' button.         (8) Navigate the File Dialog to find the modified database file.	8/		
Print       modify this database file and re-locate it on other computers:         (1) Exit ChedMark 1095 all other computers that access this database.         (2) Continue modifying the database file from this computer.         (3) For each computer that accesses this database, complete the following steps:         (4) Launch ChedMark 1095 and open the Database Manager from the Filemenu.         (5) Select the following database from the Database List:         "ChedMark 1095 Database 3"         (6) Click 'OK' when informed that 1095 is unable to locate the database.         (7) Click the Locate Database' button.         (8) Navigate the File Dialog to find the modified database file.			
Copy       (2) Continue modifying the database file from this computer.         (3) For each computer that accesses this database, complete the following steps:         (4) Launch ChedMark 1095 and open the Database Manager from the 'File'menu.         (5) Select the following database from the Database List:         "ChedMark 1095 Database 3"         (6) Click 'OK' when informed that 1095 is unable to locate the database.         (7) Click the 'Locate Database' button.         (8) Navigate the File Dialog to find the modified database file.	Print		
<ul> <li>(3) For each computer that accesses this database, complete the following steps:</li> <li>(4) Launch CheckMark 1095 and open the Database Manager from the 'File'menu.</li> <li>(5) Select the following database from the Database List: "CheckMark 1095 Database 3"     </li> <li>(6) Click 'OK' when informed that 1095 is unable to locate the database.</li> <li>(7) Click the Locate Database' button.</li> <li>(8) Navigate the File Dialog to find the modified database file.</li> </ul>	Сору		
<ul> <li>(5) Select the following database from the Database List:</li> <li>"CheckMark 1095 Database 3"</li> <li>(6) Click 'OK' when informed that 1095 is unable to locate the database.</li> <li>(7) Click the 'Locate Database' button.</li> <li>(8) Navigate the File Dialog to find the modified database file.</li> </ul>		(3) For each computer that accesses this database, complete the following steps:	
<ul> <li>(6) Click 'OK' when informed that 1095 is unable to locate the database.</li> <li>(7) Click the 'Locate Database' button.</li> <li>(8) Navigate the File Dialog to find the modified database file.</li> </ul>		(5) Select the following database from the Database List:	
(8) Navigate the File Dialog to find the modified database file.			

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:

		Rename	e Database		
New Name	New Name	Database			
				OK	Cancel

#### **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

$\overline{\mathbf{n}}$	Remove databas	se from list?		
Print	Are you sure you want to re	move the selected database from the lis	t?	1
Сору				4
			Yes	No

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**

- 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.

			«Mark 1095 E-File :		
mployers		1094	<b>heck</b> Ma 095 Soft ⊪∎ <mark>◎</mark>	rk" ware Filter	
Sample Co					
	Update Em	ployer	New Employer	Delete Employer	]
			Open Database		
nployees	Filter	(	Open Database		All Status
nployees	Filter		Open Database		All Status
nployees	Filter	(	Open Database		All Status
nployees	Filter		Open Database		All Status
mployees	Filter	(	Open Database		All Status
mployees	Filter	plovee	Open Database	Delete Employee	

**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.

• •	General Emplo	oyer Details
	<b>Chec</b> 1095	OM8 No. 1545-2252
		2022 Form 1094-B
	1.Employer's Name	
	2.Employer identification number(EIN)	
	3a.First Name of person to contact	
	3b.Middle Name of person to contact	
	3c.Last Name of person to contact	
	4.Contact telephone number	
	5.Street address (including room or suite no.)	
	6.City or town	
	7.State or province	None
	8a.Country	US
	8b.ZIP or foreign postal code	
	Issuer or Other Coverage Provider	
	Name	
	Employer identification number (EIN)	
	Contact telephone number	
	Street address (including room or suite no.)	
	City or town	
	State or province	None
	Country	US
	ZIP or foreign postal code	
	Update Employer Add Emp	ployer Cancel

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.

00	Delete Employer
	CheckMark <sup>™</sup> 1095 Softvvare
	J <b>1095</b> Software
Please verify Sample Co	that you want to delete the following employer
campio co	
	Confirm Delete Cancel

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 <u>begin</u> 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**.

ols	Sort	Window	/ Help					Fri 5:55 AM	Q
•			er Ascendi er Descend	-	Mark 1095 E-Fi	le 2022	-		
ŀ			ees Asceno ees Descer	-	heckM 095 Sot		e		
mploy	vers			109	4-B 🗘	F	ilter		
Sam	ple Co								
			Update Em	plover	New Employer	Delete	Employer		
			Update Em	nployer	New Employer	Delete	Employer	)	
				nployer	New Employer	Delete	Employer	)	
imploy	yees	Filte		nployer		Delete	Employer	All Status	
mploy	/ees	Filte		nployer		Delete	Employer	All Status	
mploy	yees	Filte		nployer		Delete	Employer	All Status	
imploy	yees	Filte		nployer		Delete	Employer	All Status	
imploy	yees	Filte		nployer		Delete	Employer	All Status	
Employ	vees	Filte		nployer		Delete	Employer	All Status	
Employ	yees	Filte		nployer		Delete	Employer	All Status	

# 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

Admin Backup Database Download Cloud Backup Restore Database IO95 Software Employers 1094-B © Filter	10997
Employers	
Employers 1094-B 🗘 Filter	
Sample Co	
Update Employer New Employer Delete Employer	
Open Database	
Employees Filter All	Status 📀
Update Employee New Employee Delete Employee	
Update Employee New Employee Delete Employee	
Database: CheckMark 1095 Database - 1095 Year 2022	

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

00	CheckMark 1095 Admin
	CheckMark <sup>™</sup> 1095 Softvvare
Users	
Admn	
-	
Add User	Update User Delete User Close

3. Enter the Name and Password.

Note: The Name and Password are case sensitive.

4. 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.

20

• • •	User Details	
	CheckMark <sup>™</sup> 1095 Softvvare	
User Information		
User Name Admin		
Password •••••		
Re-enter Password		
This user should be granted a	DMIN privileges 🗸	
	Add User Update User Cancel	

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.

<b>Check</b> 1095 Sc	Mark™	
 that you want to dele		mploye
	Cancel	_

**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.

		indow Help		ς Sun 10:46 Ι
		€= ckMark 1095 E-F €-	ile 2022	
		CheckM 1095 So	lark <sup>™</sup> ftvvare	
Employers		1094-B 🗘	Filter	
Sample Co				
	Update Emplo	oyer New Employe	Delete Employer	)
		Open Databas	e	
Employees Filt		Open Databas	e	All Status
Employees Filt		Open Databas	e	All Status
Employees Filt		Open Databas	e	All Status
Employees Filt		Open Databas	e	All Status
Employees Filt		Open Databas	e	All Status
Employees Filt		Open Databas	e	All Status

# **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.

	<b>Check</b> Mark <sup>™</sup> 1095 Software	
sers		
Admin		
Add User	Update User Delete User	Close

# **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.

•	Chec	ckMark 1095 E-File 2	022	
		C <b>heck</b> Ma 1 <b>095</b> Soft	rk <sup>™</sup> ∕vare	
nployers	109	4-В 📀	Filter	
Sample Co				
	Undata Employar	New Employer	Delete Employer	1
	Update Employer	New Employer	Delete Employer	
		Open Database		
nployees	Filter			All Status
	Update Employee	New Employee	Delete Employee	

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**.

- 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.

0.0	Error
	CheckMark <sup>™</sup> 1095 Software
	The following errors were discovered:
Employee's SSN: Must I	be of form XXX-XX-XXXX or XXXXXXXXX and if DOB is blank then SSN is must.
Employee's Date of Birt	h: Invalid format. Format must be (YYYY-MM-DD).
Employee's City: Must b	be between 1 and 22 characters.
Employee's ZIP: Must b	e of form XXXXX or XXXXX-XXXX.
Employee's 'Origin of th	e Policy' must be of any value from 'A' to 'G'
	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.

	<b>Check</b> 1095 So	Mark™
-		te the following employ
A, Enya	nat you nam to dolo	to the following employ
Bob, Dylan		

## **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 <u>start</u> 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**.

✓ Sort Employer Ascending Sort Employer Descending ✓ Sort Employees Ascending Sort Employees Descending Vare Employers 1094-B ♥ Filter	
Employers 1094-B C Filter	
Sample Co	
Update Employer New Employer Delete Employer	
Open Database	
Employees Filter	All Status

## 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.* 

0		CheckMark 1095 E-File 2022				
		CheckMar 1095 Softv	rk™ vvare			
Employers		1094-В 📀	Filter			
Sample Co						
	Update Emple	oyer New Employer	Delete Employer			
		Onen Detekone				
		Open Database				
Employees	Filter			NOT Completed		
Dylan, Robert						
Jagger, Mick						
Jett, Joan						
	Lis data Emplo					
	Update Emplo	oyee New Employee	Delete Employee			

#### **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

Sample Co Update Employer New Employer Delete Employer Open Database mployees Filter NOT Completed Dylan, Robert		Chec	ckMark 1095 E-File 2	022	
Sample Co Update Employer New Employer Delete Employer Open Database mployees Filter NOT Completed Dylan, Robert			C <b>heck</b> Mai 1 <b>095</b> Soft\	rk™ ∕vare	
Update Employer New Employer Delete Employer Open Database mployees Filter NOT Completed Dylan, Robert	mployers	109	4-в 🗘	Filter	
Open Database NOT Completed Dylan, Robert	Sample Co				
Open Database NOT Completed Dylan, Robert					
Open Database       imployees       Filter       Dylan, Robert					
Employees Filter NOT Completed Dylan, Robert		Update Employer	New Employer	Delete Employer	
Employees Filter NOT Completed Dylan, Robert			Oner Detabase		
Dylan, Robert			Open Database		
	Employees Filter				NOT Completed
Janger Mick					
ougget mex	Dylan, Robert				
	Dylan, Robert Jagger, Mick Jett, Joan				
	Jagger, Mick				
	Jagger, Mick				
	Jagger, Mick				
	Jagger, Mick				
	Jagger, Mick				
Update Employee New Employee Delete Employee	Jagger, Mick	Lindate Employee	New Employee	Delete Employee	

#### **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.

		C <b>heck</b> Mar 1 <b>095</b> Softv	'k™ Nare	
oloyers	la contra c	4-B 😳	Filter	
ample Co				
	Update Employer	New Employer	Delete Employer	)
		Open Database		
oloyees F	ilter			NOT Completed
ylan, Robert				
agger, Mick ett, Joan				
	Update Employee	New Employee	Delete Employee	

## **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.

CheckMark Payroll 2022			1.1-1.2		×
e Edit View Setup Payroll Repo	orts Window H	Help			
New Company	Ctrl+N		Order	Checks	Earm
Open Company	Ctrl+0		Officer	Payroll	
Close Company		22		owledg	
Database Manager			Rei	quest S	uppor More
Close Database		AN 111 B 157			
Developed Basking from Cloud		Sample C	ompany		
Download Backup from Cloud Restore Database		Sampl	e Co		
Backup Database			Filer: 941		
Start New Year 2022 (Import Prior Yea	r)	Active Employ	yees: 4		
Import Employees					
Import Employer Payees		Sample Compa			
Export Employees		Show Datab	base Path		
Export Employer Payees		vs Feed: 0 Unread		Print	Сору
Export Company		29/2021 - Critical			^
Preferences					
Select Print Font		eat news! Mac users, The 64- wroll is now available. Go to w			
Exit	Ctrl+O	I 970-225-0522 or e-mail us	at		
	can q	pport@checkmark.com and or happy to help you.	ur Support Team	will be	
Reports					
	_<<	2/1/2021			
<b>Employee Information</b>		2/1/2021			
Employee Earnings		Today is the day Form W-2 and		s must	be
<b>Employee Paychecks</b>		filed and the W2s are due to the	e employees.		
Departments/Jobs		Here are the knowledgebase lin	ks to help you file	W-2s	~

. ....

-- -

- 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.

Save				
Available Fields		Selected Fields	Employees	
Last Name First Name Address Line 1 Address Line 2 City Stote Zip Social Security # Emoll Phone Number Emologee # Department Choice Direct Deposit Checkbox Prenote Checkbox Nowling # 1 Account # 1 Account # 2 Account # 2 Account # 2 Account # 3 Account # 3	Copy -> <- Remove Copy All -> <- Remove All Export Export To 1099 Export To 1095	Employee Name Employee SSN Employee Street City State Zip	Arroyo,Lydia Baez,Joan Cole,Nat K Dylan,Bab Erya,A Fiery,George Cotlock,Cl Hagar,Jammi Harrisan,George Lennon,John Lopez,Jennifer McCartney,Paul Orlando,Steve Parrot,Fred Ramos,John Randolph,Bruce Reyes,Oscar Rodrey,Louis Springsteen,Bruce Vernont,Jim York,New	

- 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.

- 3. Under the File menu select Import Employer. File Edit View Tools Sort Help Create Database CheckMark<sup>™</sup> 1095 Software Import Employer Import Employee Import Prior Year Open Database 1094-B ~ Filter Database Manager Close Database E File... Convert General to ALE New Employer Delete Employer Update Employer Convert ALE to General Print Forms for Employer Open Database Print Forms for Employee Exit Ctrl+Q All Status v Jagger, Mick Jett, Joan Update Employee New Employee Delete Employee
  - 4. Choose the type of employer you are importing.

C:\Users\Kiran\Desktop\1095 Software\CheckMark 1095 Database 2022 Backup 10-03-22.db

Database: CheckMark 1095 Database - 1095 Year 2022

Path:

Please select the type of Employer to create General(1094-B) OALE(1094-C)
OK Cancel

5. Click **OK** 

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

heckMark 1095 Import Type		
	CheckMa 1095 Soft Import from Payroll	
Available Fields Employer's Name	-	Selected Fields Employer's Name
Employer identification number(EIN) Street address (including room or suite no.) City or town	Add Field>	Employer identification number(EIN) Street address (including room or suite no.) City or town
State or province ZIP or foreign postal code Contact telephone number	Add All Fields>	State or province ZIP or foreign postal code Contact telephone number
First Name of person to contact Last Name of person to contact	< Remove Field	Employer identification number(EIN)
Name Employer identification number (EIN) Contact telephone number	< Remove All Fields	]
Street address (including room or suite no.) City or town State or province	~	
Import TX	T Import CSV	Cancel

- 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.

Import Employer			beckMa	rle	
Import Employee			CheckMa 095 Soft		
Import Prior Year			095 301	ware	
Open Database		10	94-B 🗸	Filter	
Database Manager					
Close Database					
E File					
Convert General to ALE					
Convert ALE to General		Update Employer	New Employer	Delete Employer	
Print Forms for Employer					
Print Forms for Employee			Open Database		
Exit	Ctrl+Q				All Status
	Ctrl+Q				All Status
Exit Dylan, Robert Jagger, Mick Jett, Joan	Ctrl+Q				All Status
Dylan, Robert Jagger, Mick	Ctrl+Q	Update Employee	New Employee	Delete Employee	All Status

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

Under the File menu select Import...

5.

- 42
- 7. Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically populate for you.

		<b>Check</b> Mar 1 <b>095</b> Softv	vare
		Import from Payroll	
vailable Fields			Selected Fields
mployer's Name mployer identification number(EIN)	^		Employer's Name Employer identification number(EIN)
treet address (including room or suite no.)		Add Field>	Street address (including room or suite no.)
ity or town tate or province			City or town State or province
IP or foreign postal code ontact telephone number		Add All Fields>	ZIP or foreign postal code Contact telephone number
irst Name of person to contact			Employer identification number (EIN)
ast Name of person to contact ame		< Remove Field	
mployer identification number (EIN)		< Remove All Fields	
ontact telephone number treet address (including room or suite no.)			
ity or town			
tate or province	· ·		
Import	DIT	Import CSV	Cancel

- 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.

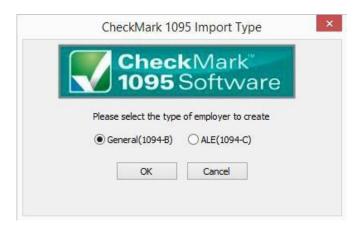
**Note:** If the employer you want to import employees to does not exist, you will need to create a new employer or import an employer before importing employees. For information on creating a new employer or importing an employer, see "Creating a New Employer" on page 14 or "Importing an Employer" on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

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

Create Database					
Import Employer			heckMa	ark	
Import Employee Import Prior Year Open Database Database Manager			CheckMa 095 Soft <sup>94-8</sup> ∽	Filter	
Close Database		-			
E File					
Convert General to ALE Convert ALE to Genera Print Forms for Employ		Update Employer	New Employer	Delete Employer	
Print Forms for Employ			Open Database		
Exit	Ctrl+Q				All Chature
Exit					All Status
					All Status
Exit Dylan, Robert Jagger, Mick		Update Employee	New Employee	Delete Employee	All Status

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

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



6. 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**.

heckMark 1095 Import Type			
wailable Fields		CheckMar 1095 Softv Import from Payroll	
Employer's Name Employer's Name Street address (including room or suite no.)	^	Add Field>	Employer's Name Employer identification number(EIN) Street address (including room or suite no.)
City or town State or province ZIP or foreign postal code Contact telephone number		Add All Fields>	City or town State or province ZIP or foreign postal code Contact telephone number
First Name of person to contact Last Name of person to contact Name		< Remove Field	Employer identification number(EIN)
Employer identification number (EIN) Contact telephone number Street address (including room or suite no.) City or town State or province	~	< Remove All Fields	

- 7. An Open Dialogue box appears allowing you to browse to the location where you saved your text file.
- 8. 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.

Import Employer Import Employee Import Prior Year			<b>heck</b> Ma 095 Soft	irk™ ware	
Open Database		10	94-B 🗸	Filter	
Database Manager					
Close Database					
E File					
Convert General to	ALE				
Convert ALE to Ger	ieral	Update Employer	New Employer	Delete Employer	
Print Forms for Emp	ployer				
Print Forms for Emp	ployee		Open Database		
Exit	Ctrl+Q				All Status
Dylan, Robert lagger, Mick lett, Joan					

. 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.

Import Employer Import Employee Import Prior Year			<b>heck</b> Ma 095 Soft	ark™ ware	
Open Database		10	94-B V	Filter	
Database Manager		-		1I	
Close Database					
E File					
Convert General to ALE					
Convert ALE to General		Update Employer	New Employer	Delete Employer	
Print Forms for Employer					
Print Forms for Employee			Open Database		
Exit	Ctrl+Q				All Status
		,			All Status
yylan, Robert agger, Mick ett, Joan					
	22				

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.

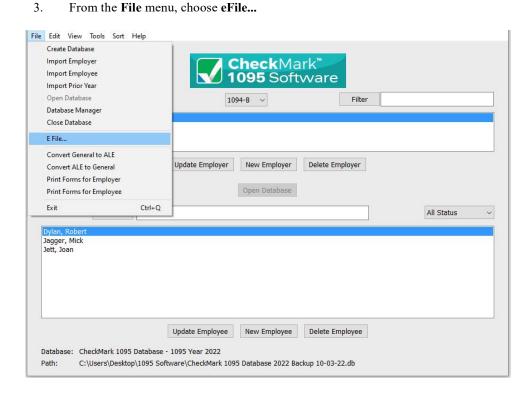
#### Creating a file to eFile

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



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

	×
CheckMark 1095 Software	
The following errors were discovered:	
Continue Anyway Cancel	
	The following errors were discovered:

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

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

Cheo 1095	<b>ck</b> Mark <sup>™</sup> Software
Transmitter Control Code	
Transmitter TIN	
Transmitter Name	
Transmitter Company	
Transmitter Mailing Address	
Transmitter City	
Transmitter State	None
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 C	ancel How to E-File

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.

	CheckMark 1095 Software	
-	Follow these simple steps for E-Filing	
1) <u>Get Fo</u>	orm 4423 - Application for ACA Requirements filing electronically (	(ACA)
2) Creat	e ACA System Account	
3) Login	to your ACA Account	
4) <u>Send</u>	a Test File!	

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

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

Error	X
<b>Check</b> Mark <sup>®</sup> <b>1095</b> Software	
The following errors were discovered:	
Transmitter Control Code: Must be 5 alpha/numeric characters. Transmitter Titl: Must be 9 digits. Transmitter Tommer: Must be between 1 and 40 characters. Transmitter's Mailing Address: Must be between 1 and 40 characters. Transmitter's Mailing Address: Must be between 1 and 40 characters. Transmitter's City: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's State: Must be a valid U.S. state or territory (name or abbreviation). Transmitter's Tare: Must be device 1 and 40 characters. Contact FirstWame: Must be between 1 and 40 characters. Contact LastWame: Must be between 1 and 40 characters. Contact SatWame: Must be between 1 and 40 characters. Contact's Phone Number: Must be of form XXX-XXX-XXXX-XXXX-XXXX.	
Continue Anyway Cancel	

- 10. 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.
- 11. A **Save as** dialog box opens. you will save 2 files. One is a manifest file and the other is a form file.

0.0 0				Save Report						
	Save As: Tags:	10948	3_Req	vest_55555_20	22:0904	¥T20				
	0		_Rep	orts		0		Q Sear	ch	
Favorites	CheckMark ChkbkBal.pdf class qulict Coddington.d Comparssaj costa project. Costa Risey Costa Risey Costa Risey Costa Risey Costa Risey Databastilit I easy off FIXXXXsay.	s.doc locx 2 y.doc doc doc docx y.log docx		1095 Multiledger Payroll			2022		Configuration Backups Reports CheckM_017.db	
	Format:	.xml f	iles (.:	kmi)		Ð				
New Folder									Cancel Sav	e

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**

 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 Efile 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.

it View Window	
Che 1095	<b>ck</b> Mark <sup>™</sup> Software
Transmitter Control Code	
Transmitter TIN	
Transmitter Name	
Transmitter Company	
Transmitter Mailing Address	
Transmitter City	
Transmitter State	None ~
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 C	ancel 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

dit View Window	
Chec 1095	<b>ck</b> Mark <sup>™</sup> Software
Transmitter Control Code	
Transmitter TIN	
Transmitter Name	
Transmitter Company	
Transmitter Mailing Address	
Transmitter City	
Transmitter State	None
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 G	ancel 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.** 

tabase Cloud Backup Itabase Update Employe	1095 Soft	Filter Filter	
tabase	1094-B ~	Filter	
Update Employe	er New Employer		
Update Employe	0.0	Delete Employer	
Update Employe	0.0	Delete Employer	
Update Employe	0.0	Delete Employer	
Update Employe	0.0	Delete Employer	
	0.0	Delete Employer	
C.	Open Database		
	open balabase		
21 72			
12			All Status
Update Employe	e New Employee	Delete Employee	

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.

		Save As: C	heckMark '	1095 Database 2	022 Backu	•			
		Tags:							
< > ∷ ≡ □	0		Auto	Backups	0		Q, Searc	h.	
Favorites iCloud Drive Applications Desktop Documents Downloads Devices Kinsti Fisher's iBook G4 Macintosh HD KinSGTON É Tags Red	CheckMark ChebkBal.pdf ChebkBal.pdf Class qulicts.doc Coddington.docx comcast12-12 Compar.ssay.doc Costa Riure.doc Costa Risay.doc Costa Risay.doc Costa Risay.doc Databas.tility.log easy off FIXXXX.say.docx GC0 essay.docx Harlemnce.pptx	Multiledger Payroll		2022		Configuration Backups Reports CheckM_017.db	_Auto_Backups		CheckM_4-17.
New Folder		Format:	1095 Datal	base Backup (*.db	)			Car	ncel Save

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.** 

	Tools Sort Help Admin			
	Backup Database Download Cloud Backup	CheckMa 1095 Sof	ark <sup>™</sup> tvvare	
	Restore Database	1004.0	Filter	
mployers		1094-B ~	Filter	
Sample Co				
	Upda	New Employer	Delete Employer	
			0.2	
		Open Database		
m <mark>ploy</mark> ees	Filter			All Status
Dylan, Robert	•			
Jagger, Mick				
Jett, Joan				
	Undat	te Employee New Employee	Delete Employee	
	opual	in Employee	benete Employee	

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

0 0 •		Resto	ore Database			
< > ः ≡ • ∞		Auto_Ba	ickups 🗘		Q Search	
Favorites All My Files Cicloud Drive Applications Desktop Downloads Devices Kristi Fisher's iBook G4 Macintosh HD KINGSTON ▲	Carolinigginsciancadox CheckMark ChtbkBal.pdf CheckMark ChtbkBal.pdf Cass questionflicts.doc Coddington.docx Coomast12-12 Compare ast Essy.doc Costa Rica brouchure.doc Costa Rica brouchure.doc Costa Ricae Essy.doc Costa Ricae Sssy.doc Database Utility.log asy off FIXXXX Aressy.docx E FIXXXXX Aressy.docx E Co essy.docx Harlem Renaissance.pptx	1095 Multiledger Payroli	> 2017	Configura Backups CheckM01	> >	ickups ►
Media	Health EC.docx	in Enable: 1095 Database	e Backup (*.db)	,0,		
					Cancel	Open

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.