



CHECKMARK 1095

SOFTWARE

User Manual

CheckMark, Inc. 323 W Drake Rd, Ste. 100, Fort Collins, CO 80526

Tel: 970.225.0522 | Fax: 970.225.0611 | sales@checkmark.com | www.checkmark.com

Information in this manual is subject to change without notice. This manual ("Manual" or "Documentation") and the software ("Software") described in it are copyrighted, with all rights reserved. By using this Manual and accompanying Software, you, the end user, agree to the terms set forth in the License Agreement.

Copyright

Under the copyright laws, this Manual or the Software may not be copied, in whole or in part, without the express consent of CheckMark Inc. ("CheckMark Software"), except in the normal use of the Software or to make a backup copy of the Software for your own use. The same proprietary and copyright notices must be affixed to any permitted copies as were affixed to the original. This exception does not allow copies to be made for others, whether or not sold, but all of the material purchased (with all backup copies) may be sold or given to another person. Under the law, copying includes translating into another language or format.

Federal copyright law prohibits you from copying the written materials accompanying the Software without first obtaining our permission. You may not alter, modify or adapt the Software or Documentation. In addition, you may not translate, decompile, disassemble or reverse engineer the Software. You also may not create any derivative works based on this Software or Documentation. A derivative work is defined as a translation or other form in which the Software may be recast, transformed or adapted.

Limited Warranty on Media and Replacement

EVEN THOUGH CHECKMARK INC. HAS TESTED THE SOFTWARE AND REVIEWED THE DOCUMENTATION, CHECKMARK INC. MAKES NO WARRANTY OR REPRESENTATION, EITHER EXPRESS OR IMPLIED, WITH RE-SPECT TO THE SOFTWARE, ITS QUALITY, PERFORMANCE, MERCHANTABILITY, OR FITNESS FOR A PARTIC-ULAR PURPOSE. AS A RESULT, THIS SOFTWARE IS SOLD "AS IS", AND YOU THE PURCHASER ARE ASSUMING THE ENTIRE RISK AS TO ITS QUALITY AND PERFORMANCE. IN NO EVENT WILL CHECKMARK INC. BE LIABLE FOR DIRECT, INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES RESULTING FROM ANY DEFECT IN THE SOFTWARE OR ITS DOCUMENTATION, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

The Warranty and remedies set forth above are exclusive and in lieu of all others, oral or written, express or implied. No CheckMark Inc. dealer, agent, Consultant, or employee is authorized to make any modification, extension, or addition to this warranty.

Some states do not allow the exclusion or limitation of implied warranties or liability for incidental or consequential damages, so the above limitation or exclusion may not apply to you. This warranty gives you specific legal rights, and you may also have other rights which vary from state to state.

Trademarks

CheckMark Inc. and MultiLedger are registered trademarks of CheckMark Inc. All other references are trademarks of their respective owners. © 2024 CheckMark Inc. pdf rev 11/24.

Table of Contents

Chapter 1 Getting Started	6
System Requirements.....	6
Software and Patch Updates	7
How to Purchase and Download CheckMark 1095 Software	8
How to Get More Help	10
Before Contacting Support/Other Resources	11
Chapter 2 Installation, Activation and Basic Use.....	13
Installing and Activating 1095 software	13
How to Install Software on Additional Computers.....	16
How to Remove Computers from the License	18
Opening CheckMark 1095: New User	20
Opening CheckMark 1095: Upgrading Old Files.....	21
Starting a New Year (Import Prior Year).....	22
Using the Database Manager	28
Create New Database.....	29
Chapter 3 Creating a New Employer	33
Creating a New Employer	33
Updating an Existing Employer.....	35
How to Add Additional Companies	35
Chapter 4 Set Up	38

Setting up Users and Passwords.....	38
Setting Screen Font Size	41
Adjusting Screen Size.....	42
Chapter 5 Setting up Employees	43
Creating New Employee	43
Updating an Existing Employee	45
Deleting a Employee.....	47
Filtering Employees	48
Sort Employees.....	48
Status.....	49
Selecting Multiple Employees	52
Chapter 6 Exporting and Importing.....	54
Exporting Company Information from CheckMark Payroll	54
Exporting Company Information from MultiLedger.....	55
Exporting Employees from CheckMark Payroll	55
Importing Employer information from CheckMark Payroll or MultiLedger.....	56
Importing a Employees from CheckMark Payroll and MultiLedger	58
Importing using a tab-delimited text file.....	59
Text File Format for Importing	62
Chapter 7 Printing 1094 & 1095 Forms	63
Print 1094 Forms and 1095 Form for Each Employer	63
Printing 1095s for Employees.....	65

Chapter 8 e-File	66
Creating a file to e-File	66
Corrected/Replacement Transmission	70
Chapter 9 Backup and Restore	72
Backing Up Using the Backup Database Command	72
Restoring Database using Restore Database Command	74

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 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. 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 Purchase and Download CheckMark 1095 Software

1. Sign in to **My Account** using your credentials and go to the 2025 Updates Portal.


My Account Link: <https://www.checkmark.com/account/sign-in>
2. Choose the software you want to purchase. By default, one employer and one computer will be included as part of the base license.

 ACCOUNT INFO ▾ PRODUCTS ▾ SUPPORT ▾ 2025 UPDATES My Account 

2025 Software Updates Portal

Update your CheckMark Software, stock up on essential paper products, and streamline your processes to ensure smooth business operations throughout the year. Staying up-to-date and well-prepared ensures compliance with the IRS and state requirements.

Welcome back, Andrew! [Already purchased? Download your software updates here >](#)



CheckMark 1095 Software

★★★★★ (5/5)

CheckMark 1095 Software is a low-cost solution that allows Small and Medium size business to report and file or transmit ACA (Affordable Care Act) requirements of health care coverage provided to employees and the IRS.

[Learn More About CheckMark 1095 Software >](#)

2024 Tax Year Version

\$478.00

[Add to Cart](#)

a

Companies (\$30 each) ⓘ

- 1 +

b

Computers (\$99 each) ⓘ

- 1 +

c

Version

E-File ▾

d

Platform

Select Platform ▾

e

☒ Cloud Backup Add-On - \$59.00 (12 Months) ⓘ

f

Software Plans:

★ MOST POPULAR

CheckMark 1095 E-File Pro+ (\$419.00) Chosen by 92% of Customers

Get the ultimate experience with our Pro+ plan, which offers top-of-the-line customer support, including priority assistance, an exclusive toll-free phone number, live chat support, and data recovery services. Best for business owners and CPAs who seek faster responses and top-priority assistance with their issues. Your success is our priority, and the Pro+ plan is your ticket to excellence. [Learn More >](#)















CheckMark 1095 E-File Pro (\$399.00)

Ideal for customers looking for excellent service and great value. Best for customers with basic knowledge of tax reporting and filing. [Learn More >](#)

- (a) Add the number of companies you want to manage with your software.
 - (b) Add the number of computers you wish to install the software on.
 - (c) Select version E-File or Print.
 - (d) Select the platform.
 - (e) Make sure the Cloud Backup Add-On is selected to protect your data with secure backups, giving you peace of mind and easy access to your information anytime, anywhere.
 - (f) Always select the Pro+ Update to enjoy priority support and faster response times, ensuring your issues are resolved quickly and your workflow stays uninterrupted.
3. Click **Add to Cart** and then scroll down to the bottom of the page and click **Next** to proceed.
 4. Remember to stock up on checks, business, and tax forms for your business. Simply add the necessary items to your cart and click **Next** to complete your order.
 5. Review the items in your cart, confirm your billing address, enter your payment details, and complete your purchase.
 6. Once the payment is successful, you will be taken to the **Product Details** page.

Here you will find the

- (a) **Download links**
- (b) **License Key** – This is a 16-character alphanumeric code. Keep it secure and do not share it with anyone to protect your software access.
- (c) **View Details** – This screen provides additional insights into your license usage, including the number of computers your software is installed on and the number of companies you have added.

		DASHBOARD	ACCOUNT INFO ▾	PRODUCTS ▾	SUPPORT ▾	2025 UPDATES	MY ACCOUNT ▾	
Product/License Details								
Software Products	Version	Platform	Last Updated	Update Available	a Downloads	b License Keys	c	
Payroll	24.0.0	Mac	05/01/2024	Yes! Click Here	32-bit  32-bit 	4542-GFGS-8481-SDEF 	View Details	
MultiLedger	14.0.0	Windows	04/25/2024	No	64-bit  64-bit 	EHTF-4GT6-1F5D-155D 	View Details	
1099 E-File	23.0.0	Mac	11/21/2023	No	32-bit  32-bit 	1FG6-51F5-431C-GFG5 	View Details	
1095 Print	22.0.1	Windows	12/14/2022	No	64-bit  64-bit 	D152-1DG2-11D2-1DF5 	View Details	

- Click to download the purchased software based on your operating system directly to your local computer.

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 OR product registration 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.

Support Plans

CheckMark Software offers several additional support plans to meet your needs:

Priority Support

300 minutes with your annual subscription, with an 800 phone number exclusively for priority support customers and top of the queue assistance. Phone, email or fax support.

Professional Support

90 minutes with your annual subscription. Phone, email or fax support.

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 check the online data base for answers to common questions. Access to the Knowledge Base can be obtained by going to the Help menu and selecting CheckMark Knowledge Base. You can also access the Knowledge Base directly from the CheckMark website at https://kb.checkmark.com .
Online Tutorials	These short videos are valuable for new users and seasoned pros alike. Each topic is easy to understand as you are taken step-by-step through features and procedures. You can access the tutorials under the Help menu in the program or by going to the CheckMark website at https://checkmark.com/ .

Contact 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**.

Our program continues to improve with the input of our users. If you wish to see a feature considered for possible implementation into the Payroll program, please send us your suggestions

Sales – 800-444-9922 or sales@checkmark.com

Support – 970-225-0387 or support@checkmark.com

Customer Service – 970-225-0522 or info@checkmark.com

Fax – 970-225-0611

Address – CheckMark Inc, 323 W Drake Rd, Ste. 100, Fort Collins, CO 80526

Chapter 2 Installation, Activation and Basic Use

If you need to install the software on multiple computers, additional licenses are required for each computer. All installations, activations, and software use require an internet connection—no more CDs.

Installing and Activating 1095 software

1. Open the folder containing the installation file for the software update, and double-click the file to start the installation process. Ensure your computer is connected to the internet during installation for a smooth setup.
2. After the CheckMark Software is successfully installed on your computer, a software activation screen will appear. Enter your Customer ID, Registered Email Address, and License Key, and then click **Submit** to initiate the activation process. (Please enter the license key in uppercase).

Note: The Customer ID can be found on the **Account Info** page, and the License Key can be located on the **Product Details** page.

Customer Number

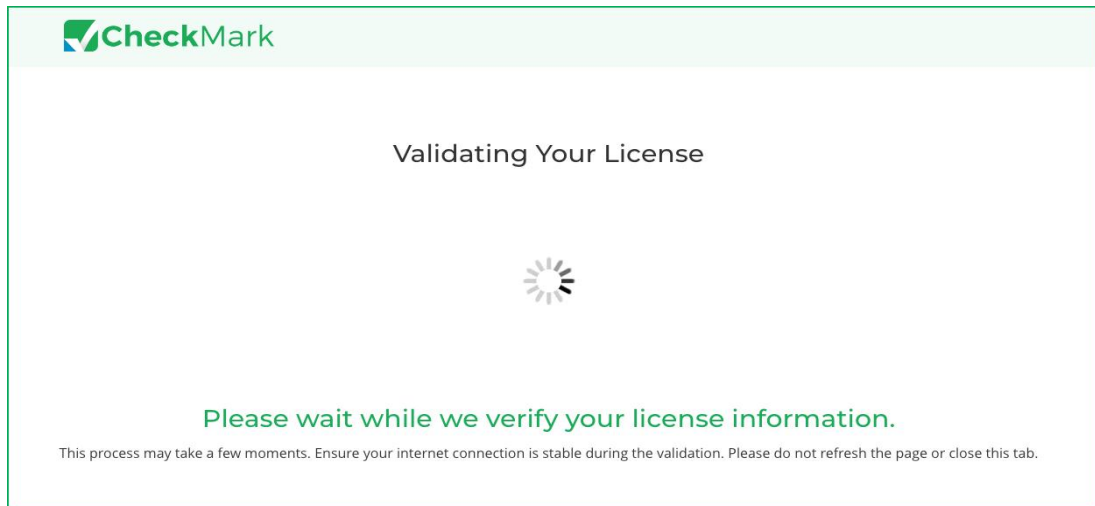
Registered Email Address

License Key - - -

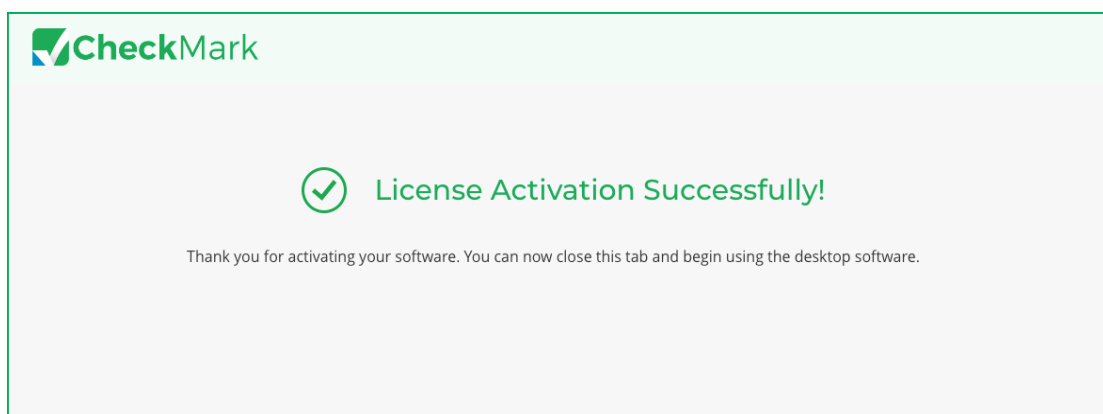
After you click "Submit", our software will verify your information. Please hold on while we process your details. Once the license key is validated, click "Ok" to proceed.

If you are installing the software on an additional computer and do not have the license, please click the 'Purchase License' link to buy an additional computer installation license.

3. If all the details are entered correctly, a web page will then open in your browser to validate your license information. The process will take a few seconds. Make sure your internet connection is stable during validation, and do not close or refresh the page.



4. Once your license information is validated, a success message will appear, and you can close the tab.



5. The **OK** button will now be enabled on the software activation screen. Click **OK**.
6. An important screen appears. Read the instructions, and then click **Continue**.

Important Information



Important Information CheckMark 1095 for 2024

Thank you for purchasing CheckMark 1095 for 2024!

As of this date, we are waiting for some of the updated forms for the 2024 tax year from the IRS. As soon as we have that information from them, you will be notified that a patch is available.

In the meantime, you can get your Employer and Employee information setup so you will be ready to go as soon as the new forms are available.

If you will be filing electronically, please read the information below.

Requirements for filing with AIR (IRS)

If you wish to file your 1095s electronically, you will need to register at least 45 days before the due date of the returns.

- Copy & paste the link below to get access to the information on how to Register and obtain a Transmitter Control Code (TCC).

Print Message

Copy Message

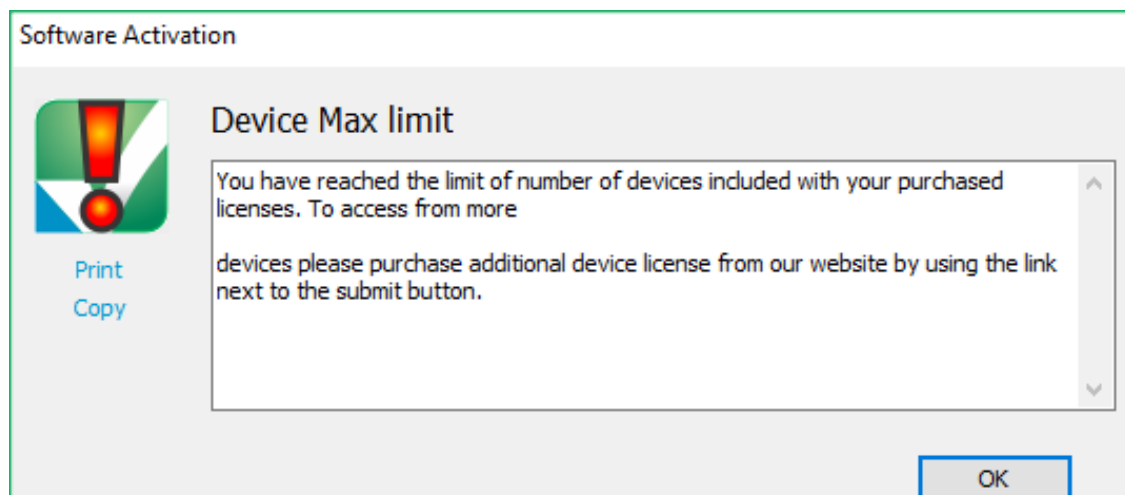
Continue

Congratulations! Your license is now activated, and your software is ready for use.

How to Install Software on Additional Computers

1. Sign in to My Account, click **PRODUCTS** in the menu, and go to **Product Details**. Click the OS version for which you want to download the software installer.
2. Run the downloaded installer and follow the on-screen instructions to complete the installation.
3. After installation, a software activation screen will appear. Enter your Customer ID, Registered Email Address, and License Key used on your original computer, then click **Submit**.

Note: After entering the license key, press **ENTER** to enable the Submit button.
4. An alert message will notify you that the maximum device limit has been reached for your license, click **OK** to proceed.



5. After the device limit popup is closed, the Purchase License button on the activation popup will now be enabled. Click on the **Purchase License** button. This will automatically log you into your CheckMark account and take you to the web page to buy additional computer licenses.

Buy Additional Computers

Buy Computers

1. Selected Application

CheckMark 1095 EFile - Additional Compi

2. Add Additional Computers (\$99 Each)

-
1
+

Order Summary

Additional Computer	\$ 99
Order Total	\$ 99

PROCEED

6. Select the number of additional licenses needed, each costing \$99, and click **PROCEED** to complete your payment. After the successful payment, close the webpage and return to the Software Activation screen, where the **OK** button should be enabled. Click **OK** to finish the activation process.

Congratulations! Your license is now activated, and your software is ready for use.

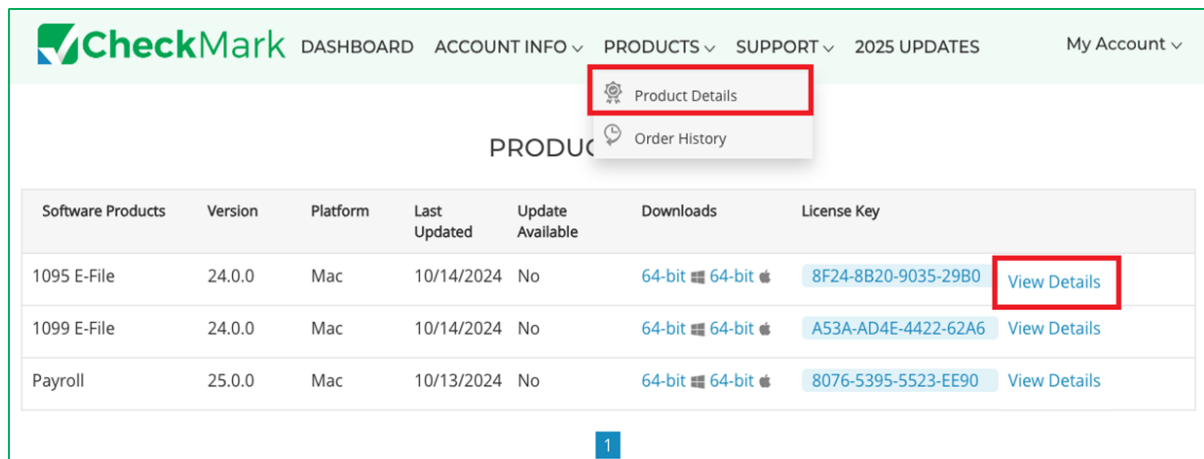
Note: To access your previous companies' data from another computer, ensure that you have copied the employer's database file from the old computer to the new one where CheckMark Software is installed. Use the **Restore Database** option from the **Tools** menu to restore previously backed-up employer data. Alternatively, use the Database Manager option from the **File** menu to fetch employer databases.

Important:

- You can only run the companies that have been paid for under your current license.
- You will only be able to open the companies that were created on the previous computer.
- To add new companies to a newly licensed computer, you must purchase additional employer licenses. If you have already purchased the licenses, you can proceed to add the companies to the new computer.

How to Remove Computers from the License

1. Sign in to My Account, click '**PRODUCTS**' in the menu, and go to the '**Product Details**' page.
2. Click on the **View Details** button for the software from which you wish to remove the associated computer installation.

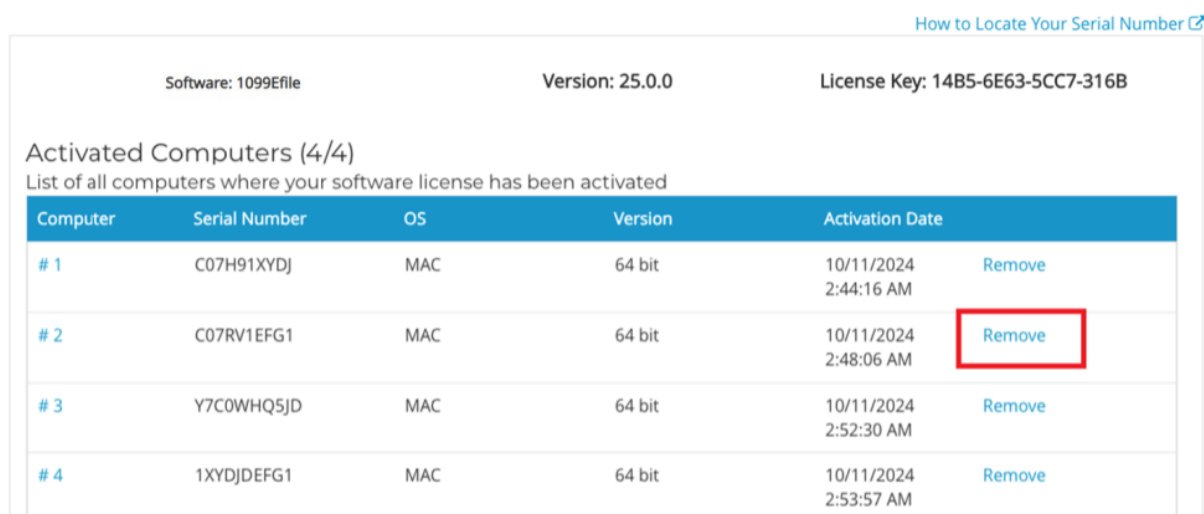


The screenshot shows the CheckMark dashboard with the 'PRODUCTS' menu open. The 'Product Details' option is selected. Below the menu is a table of software products. The 'View Details' button for the first product is highlighted.

Software Products	Version	Platform	Last Updated	Update Available	Downloads	License Key	
1095 E-File	24.0.0	Mac	10/14/2024	No	64-bit 64-bit	8F24-8B20-9035-29B0	View Details
1099 E-File	24.0.0	Mac	10/14/2024	No	64-bit 64-bit	A53A-AD4E-4422-62A6	View Details
Payroll	25.0.0	Mac	10/13/2024	No	64-bit 64-bit	8076-5395-5523-EE90	View Details

3. The License Information page will open. Locate the computer you want to remove from the license and click "**Remove**." If you are unsure of the serial key for the computer, click the link "**How to Locate Your Serial Number**" and follow the steps to find your computer's serial number.

License Information



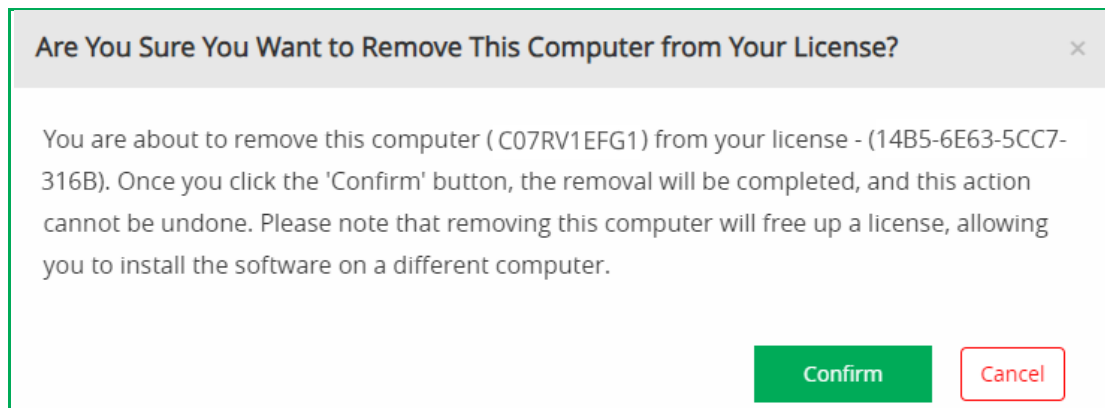
The screenshot shows the License Information page for software 1099Efile. It displays the version (25.0.0) and license key (14B5-6E63-5CC7-316B). Below this is a table of activated computers. The 'Remove' button for the second computer is highlighted.

Software: 1099Efile Version: 25.0.0 License Key: 14B5-6E63-5CC7-316B

Activated Computers (4/4)
List of all computers where your software license has been activated

Computer	Serial Number	OS	Version	Activation Date	
# 1	C07H91XYDJ	MAC	64 bit	10/11/2024 2:44:16 AM	Remove
# 2	C07RV1EFG1	MAC	64 bit	10/11/2024 2:48:06 AM	Remove
# 3	Y7C0WHQ5JD	MAC	64 bit	10/11/2024 2:52:30 AM	Remove
# 4	1XYDJDEFG1	MAC	64 bit	10/11/2024 2:53:57 AM	Remove

4. A pop-up window will appear asking for confirmation. Click the **Confirm** button to proceed.



Note: This action cannot be undone. Once the computer is removed, the license will be free for installation on another device.

5. After confirming, you will receive an email at your registered email address, confirming that the computer has been removed from the license.

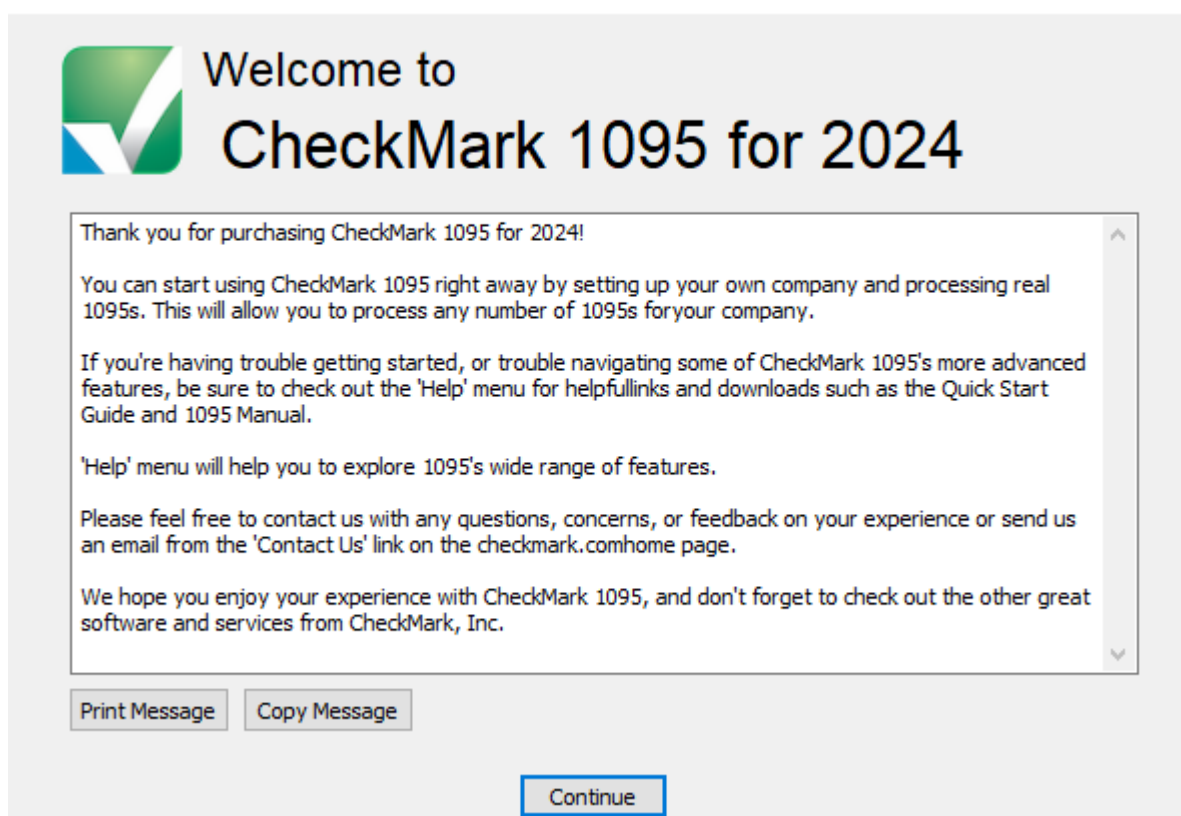
Caution: If you removed the computer either intentionally or by mistake, you will need to reinstall the software on the same or a new computer. You will need your license key, registered email address, and customer ID to activate the software. Be sure to back up all your employer's data before reinstalling to prevent data loss.

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. This screen provides useful information regarding the set up of Security, Customizing screens and fonts and accessing the Manual.

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

Welcome



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](#).

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\Documents\CheckMark\1095\(\year)

Windows: C:\Documents\CheckMark\1095\(\year)

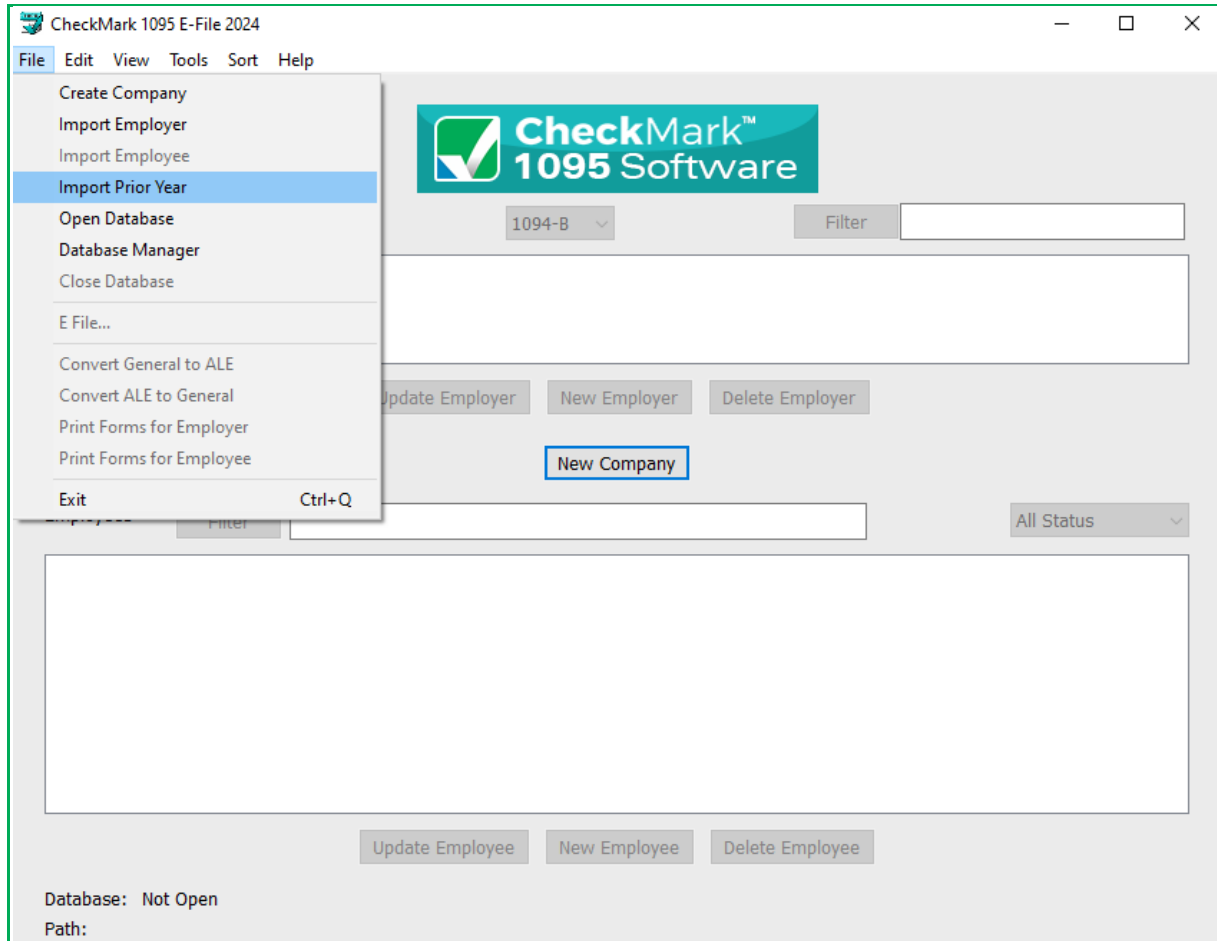
1. Open the CheckMark 1095 application. You can either use the shortcut or alias that was created or go to the CheckMark 1095 folder that was installed and double-click the CheckMark 1095 application file.
2. If you have a previous 1095 database from a prior year, the program will ask you if you want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

A screenshot of the 'CheckMark 1095 Login' dialog box. The title bar reads 'CheckMark 1095 Login'. Inside the dialog, there is a logo for 'CheckMark 1095 Software' featuring a green checkmark icon. Below the logo, there are two input fields: 'Name' with the text 'Kris' and 'Password' with five dots. At the bottom, there are two buttons: 'Execute Login' (highlighted with a blue border) and 'Cancel Login'.

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

Starting a New Year (Import Prior Year)

1. After activating the license, click **Import Prior Year** from the **File** menu.



2. The Start New Year (Import from Prior Year) screen will appear, allowing you to start importing data.

Start New Year (Import from Prior Year)

Select a prior year database and click 'Start New Year' to continue.

1095 Year

Database Name

Path

* new year already started

Add Database to List

Find Databases

Remove from List

Note: You can import up to 100 companies at a time. If you have more than 100 companies, kindly split your list and import them in batches.

Start New Year

Close

- Now select the companies you want to import from your database.

Use **Add Database to List** and **Find Databases** to search your computer for existing databases. You can only import companies from one database at a time. If you have multiple databases, repeat the process for each.

Important Update (2025 onwards): Starting with the 2025 update, each database can store only one employer. In previous versions, multiple companies could be stored in a single database. Plan accordingly when managing databases.

Start New Year (Import from Prior Year)

Select a prior year database and click 'Start New Year' to continue.

1095 Year Database Name

1095 Year	Database Name
2023	CheckMark 1095 Database

Path: C:\Users\user\Downloads\11 CheckMark 1095 Database 2023 Backup 10-14-24.db

* new year already started

EMP 1
 EMP 10
 EMP 2
 EMP 3
 EMP 4
 EMP 5
 EMP 6
 EMP 7
 EMP 8
 EMP 9

Note: You can import up to 100 companies at a time. If you have more than 100 companies, kindly split your list and import them in batches.

- After selecting the employer you want to import, click the **Start New Year** button.

Note: You can import up to 100 companies at a time. If you have more than 100 companies, kindly split your list and import them in batches.

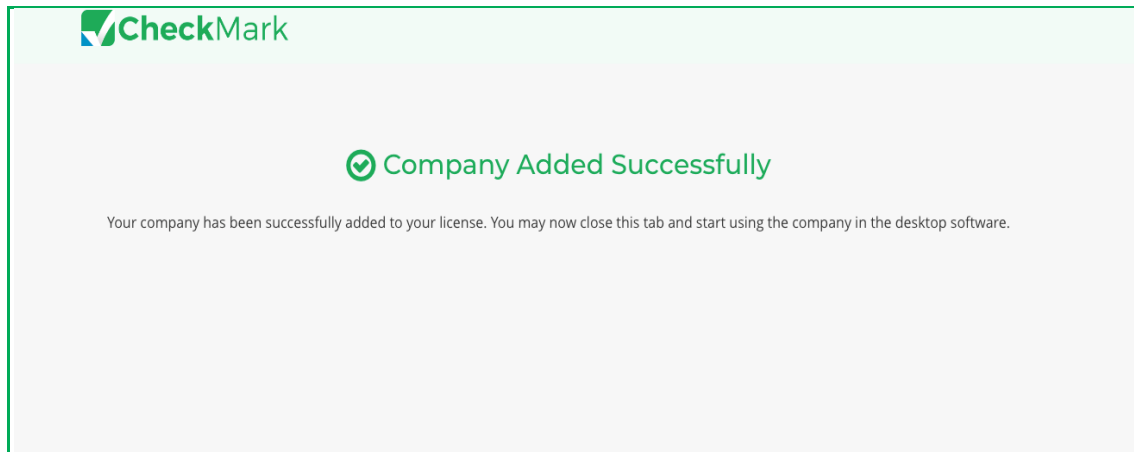
- A confirmation popup will appear, click **OK** to continue.

CheckMark Error

Verifying Information to start New Year

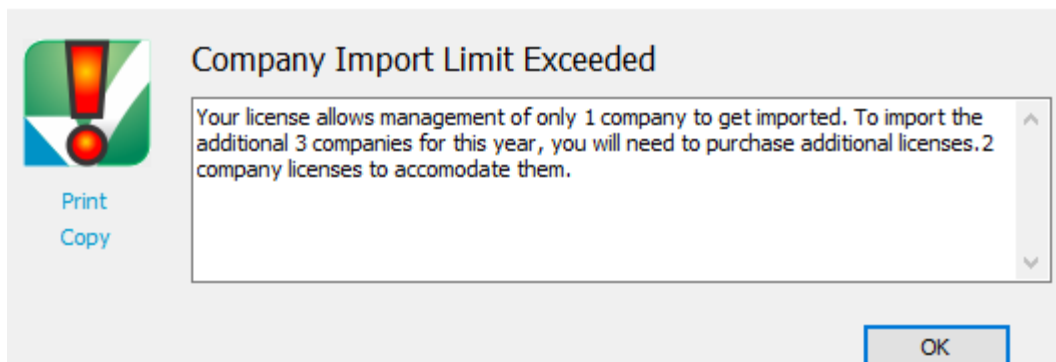
We are currently verifying the information to validate your request to start the new year. Please hold on while we process your request to import the prior year's data.

-
-
-
-
-
6. You will be taken to a web page for validation. The system will check how many companies you've purchased versus how many you're trying to import. If you are importing the correct number of companies (equal to or less than the number you purchased), the import will proceed smoothly.



If you exceed your purchase limit: An alert popup appears.

Start New Year (Import from Prior Year)

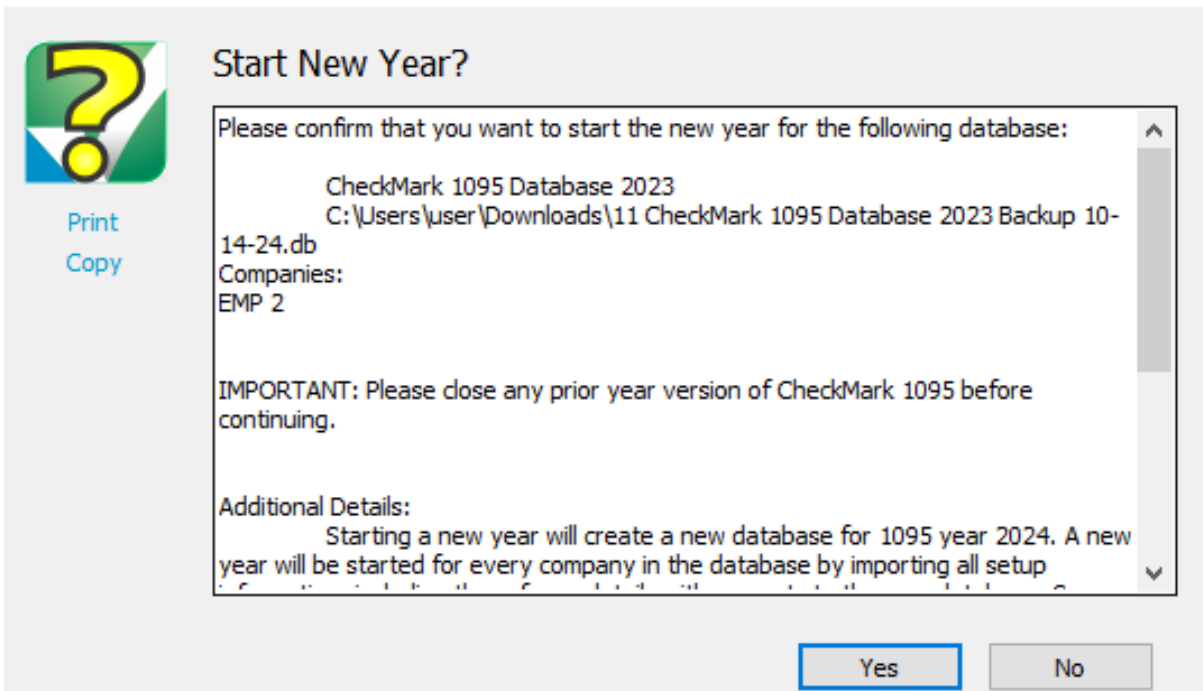


For example, if you purchased licenses for 1 employer but tried to import 3, you will be directed to the purchase page where you can buy an additional license for the extra employer.

-
-
-
-
-
-
7. After the successful addition of the employer to your license, close the webpage. Return to the application and click the **Start New Year** button on the "Start New Year (Import from Prior Year)" screen.

A confirmation popup will appear.

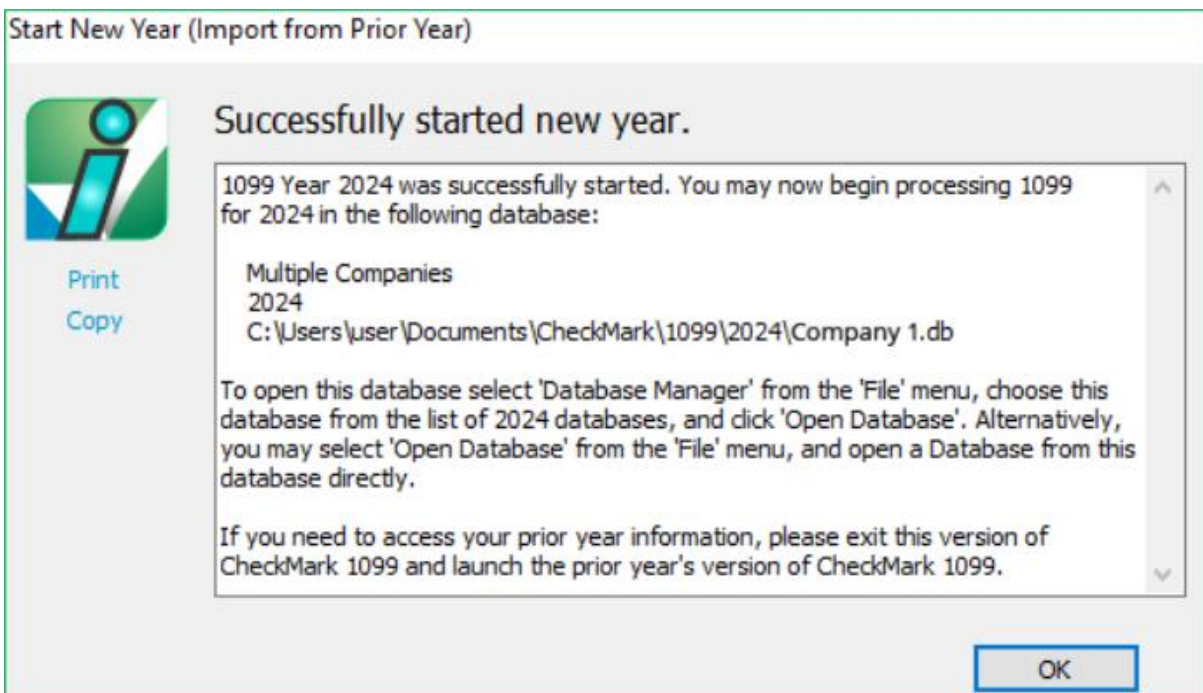
Start New Year (Import from Prior Year)



If the employer shown is correct, click **Yes** to proceed.

If it's incorrect, click **No** and select another employer from your database.

- After confirmation, a final popup will inform you that the employer has been successfully imported.



9. To start using the imported employer, click on **Open Database** or **Database Manager** from the **File** menu. Select the employer you just imported and then click **Open** to access it.

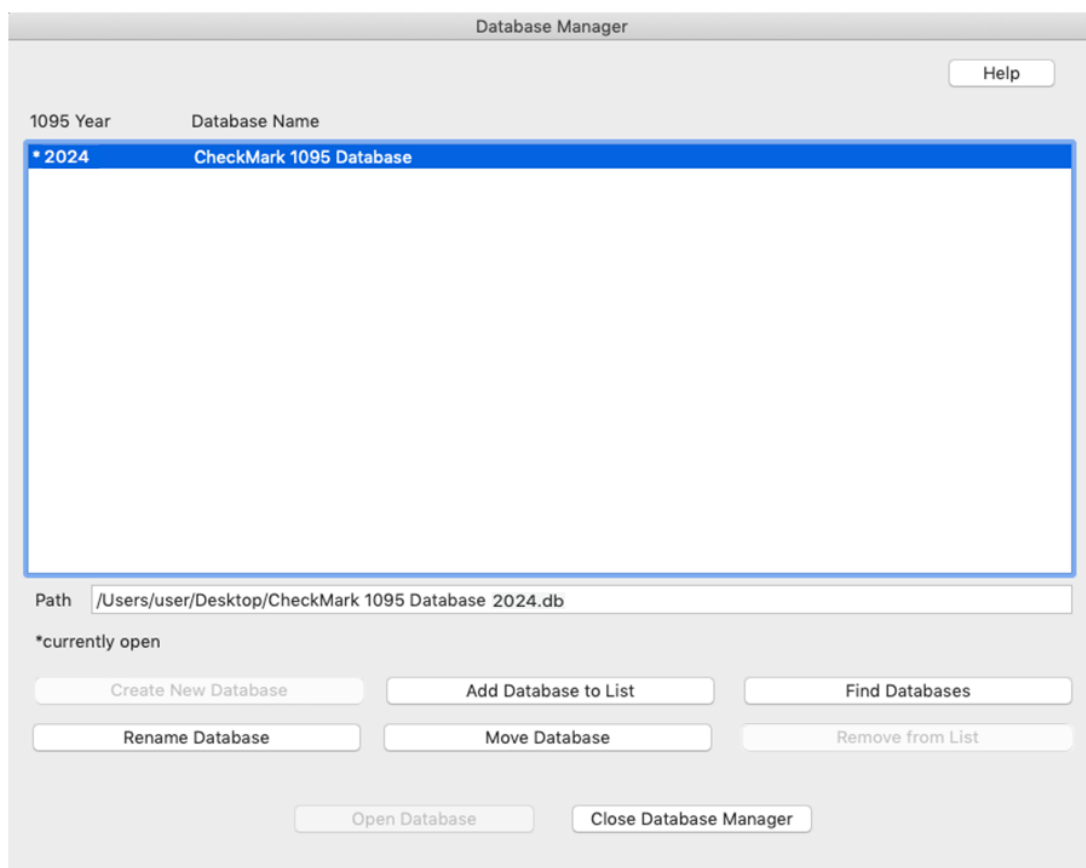
Congratulations! Your prior year's employer has been successfully imported and is now ready for your 1095 reporting process. You can now proceed with reporting 1095 taxes for the current year based on the imported data.

Using the Database Manager

CheckMark 1095 stores employer data in a database.

Important Update (2025 onwards): Starting with the 2025 update, each database can store only one employer. In previous versions, multiple companies could be stored in a single database. Plan accordingly when managing databases.

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



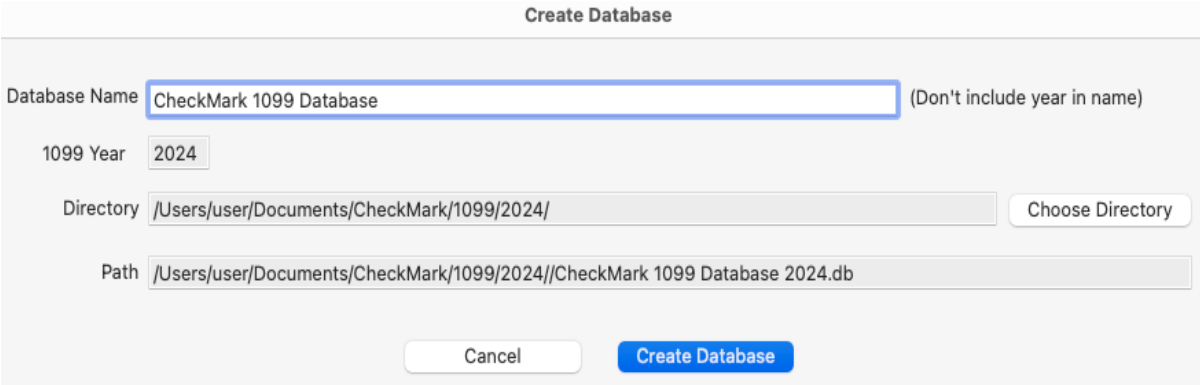
Storing Employer Files in Separate Databases

Starting in 2025, each employer must be stored in its own individual database. This change ensures that each employer's data is kept separate and managed independently. When performing actions such as backing up, restoring, closing, or advancing to a new year, these operations will now be applied to each employer's database individually.

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.

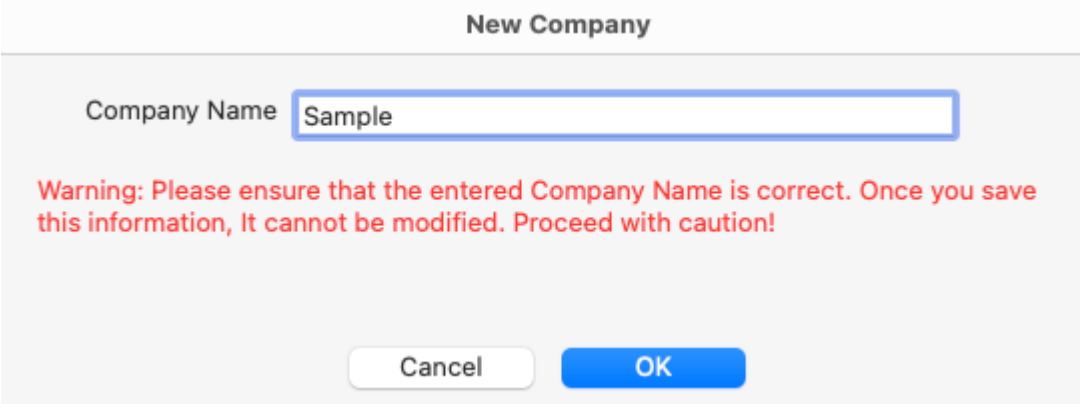
1. Click **New Employer** from the **File** menu.
2. Enter a Database Name. Click the **Choose Directory** button to select a new location to save the database.



The 'Create Database' dialog box contains the following fields and controls:

- Database Name:** A text input field containing 'CheckMark 1099 Database'. To its right is the text '(Don't include year in name)'.
- 1099 Year:** A dropdown menu showing '2024'.
- Directory:** A text input field containing '/Users/user/Documents/CheckMark/1099/2024/'. To its right is a 'Choose Directory' button.
- Path:** A text input field containing '/Users/user/Documents/CheckMark/1099/2024//CheckMark 1099 Database 2024.db'.
- At the bottom are two buttons: 'Cancel' and 'Create Database'.

3. Click **Create Database** to save the new database.
4. Enter employer name and then click **OK**.



The 'New Company' dialog box contains the following fields and controls:

- Company Name:** A text input field containing 'Sample'.
- Below the input field is a red warning message: 'Warning: Please ensure that the entered Company Name is correct. Once you save this information, It cannot be modified. Proceed with caution!'.
- At the bottom are two buttons: 'Cancel' and 'OK'.

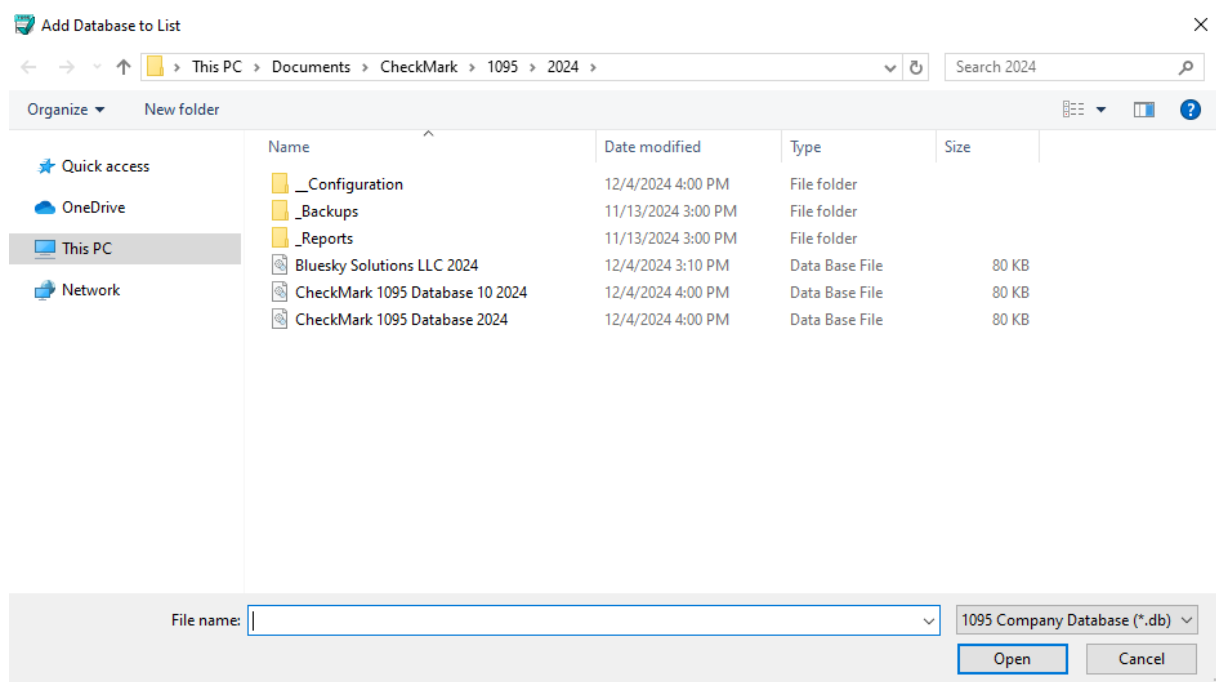
Important Update (2025 onwards): In previous versions, multiple companies could be stored in a single database. Starting with the 2025 Update, each database can store only one employer.

Add Database to List

This button allows you to add an already- existing database to the list. For example, if you copied over 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 on **Add Database to List**.

An Open dialog box appears.



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

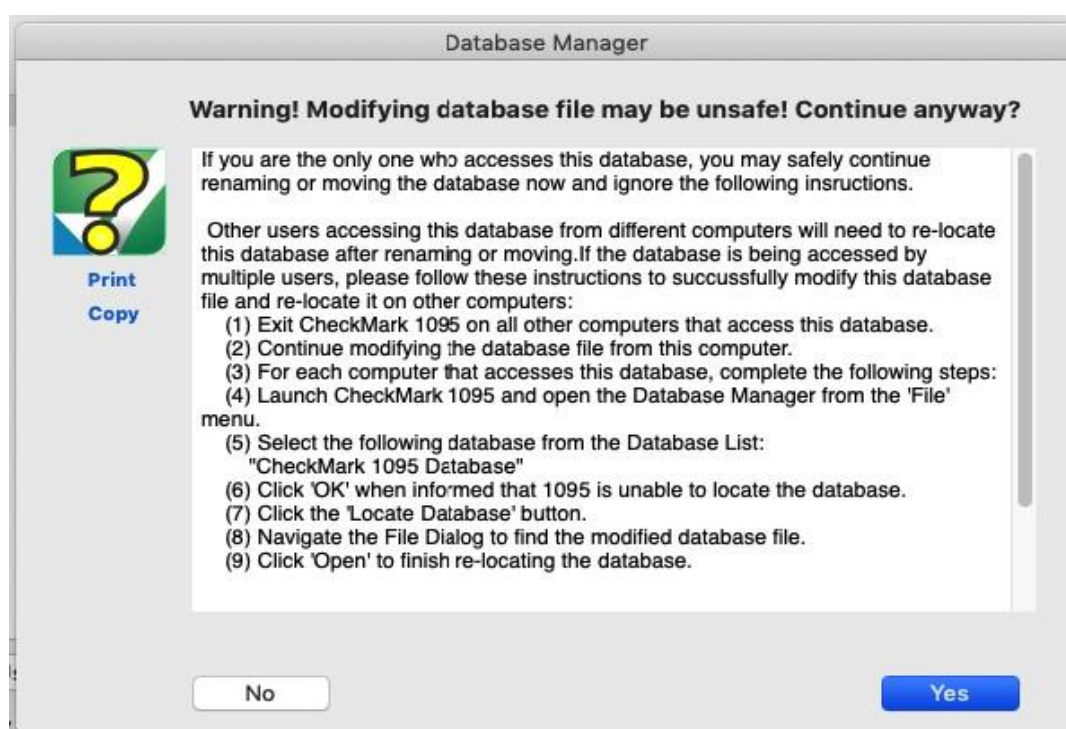
The database is added to the list in the Database Manager.

Rename Database

This option allows you to rename the database. It is recommended you use only alpha-numeric characters.

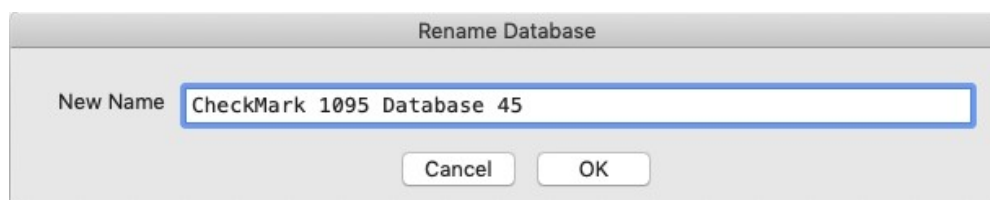
1. Click **Rename Database**.

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 **OK** to save.

The Rename Database window appears:



Open Database

This option allows you to choose a different database and open it up to view all saved 1095 companies in that particular database.

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

The new database is now open and all companies stored in this database are available under the **Open Employer** command under the **File** menu.

Close Database Manager

This option closes the Database Manager window.

Update Employer

This command 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 and click the **Update Employer** on the command center. Enter the information you want to change, and then click **Update Employer** to save the changes.

Note: Apart from the employer's name, you can modify all other employer information.

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 and enter basic employer information.

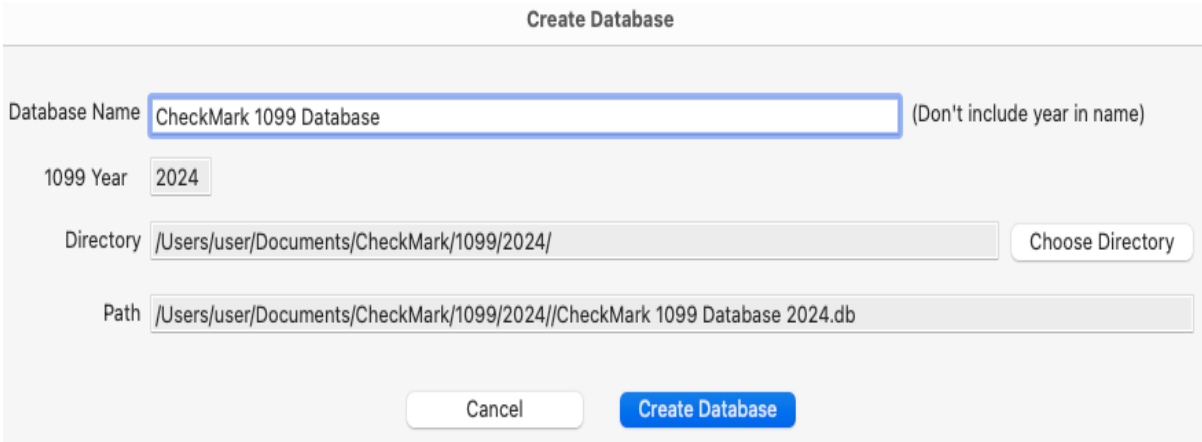
Creating a New Employer

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. Choose **New Employer** from the **File** menu.

A "Create Database" screen will appear.



The screenshot shows a "Create Database" dialog box. It has a title bar "Create Database". Inside, there are four input fields: "Database Name" (containing "CheckMark 1099 Database" with a note "(Don't include year in name)"), "1099 Year" (containing "2024"), "Directory" (containing "/Users/user/Documents/CheckMark/1099/2024/" with a "Choose Directory" button), and "Path" (containing "/Users/user/Documents/CheckMark/1099/2024//CheckMark 1099 Database 2024.db"). At the bottom are "Cancel" and "Create Database" buttons.

3. Enter a name for the new database and click the **Create Database** button.
4. When the New Employer screen appears, enter your Employer Name.

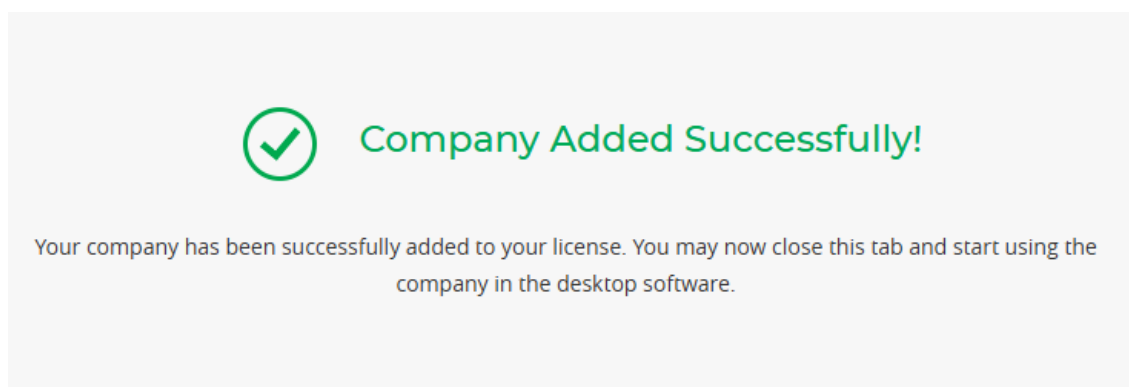
Warning: Ensure the employer name is correct, as it cannot be changed once saved.

New Company

Company Name

Warning: Please ensure that the entered Company Name is correct. Once you save this information, It cannot be modified. Proceed with caution!

5. Click **OK**.
6. You will be taken to the webpage for employer validation. Once the validation is complete, close the webpage, and the employer will be added to the employer list.



Important: Every time a new employer is added, it will be validated by taking you to a webpage. If you have already purchased the employer, it will confirm that the employer has been added successfully. If the employer has not yet been purchased, you will be taken to the webpage for purchase. An alert message will prompt you to validate the employer if it is not registered in our database; click **OK** to proceed.

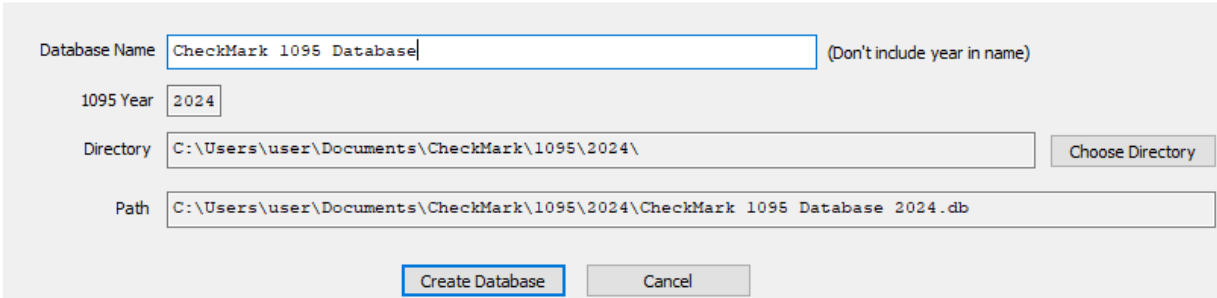
Updating an Existing Employer

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.

How to Add Additional Companies

1. Open your CheckMark Software. Navigate to the **File** menu and click **New Employer**.
A "Create Database" screen will appear.

Create Database



Database Name (Don't include year in name)

1095 Year

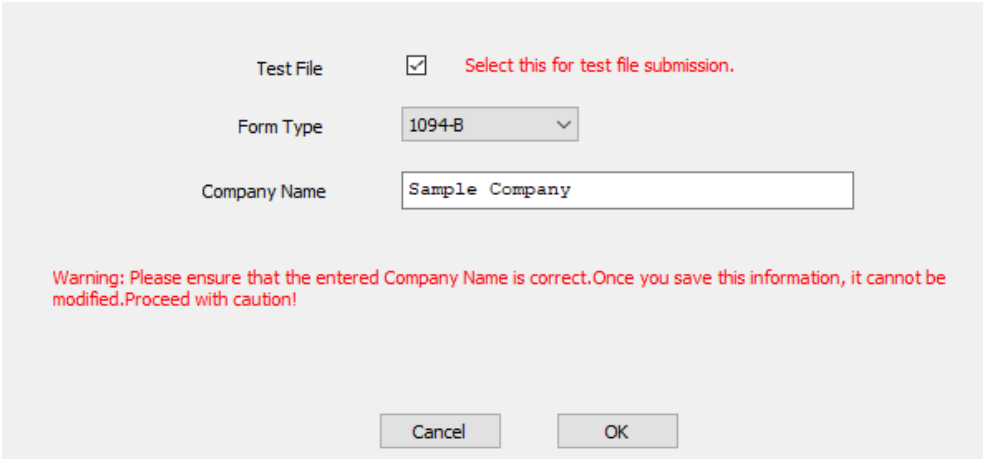
Directory

Path

2. Enter a name for the new database and click the **Create Database** button.
3. When the New Employer screen appears, enter your Employer Name.

Warning: Ensure the employer name is correct, as it cannot be changed once saved.

New Company



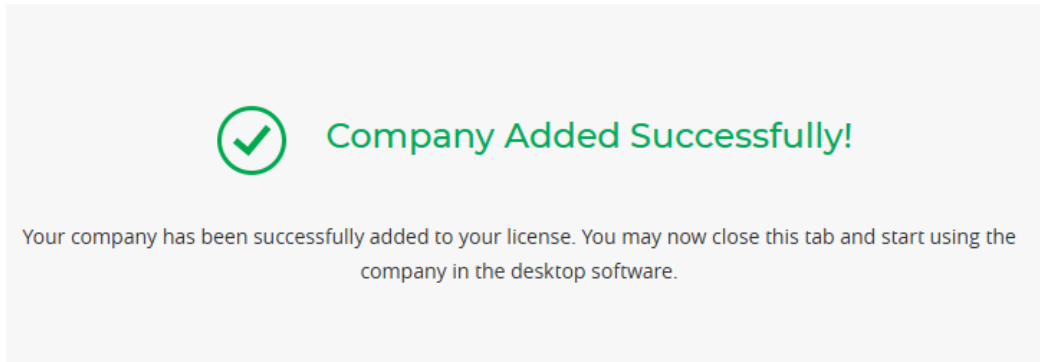
Test File ☒ Select this for test file submission.

Form Type

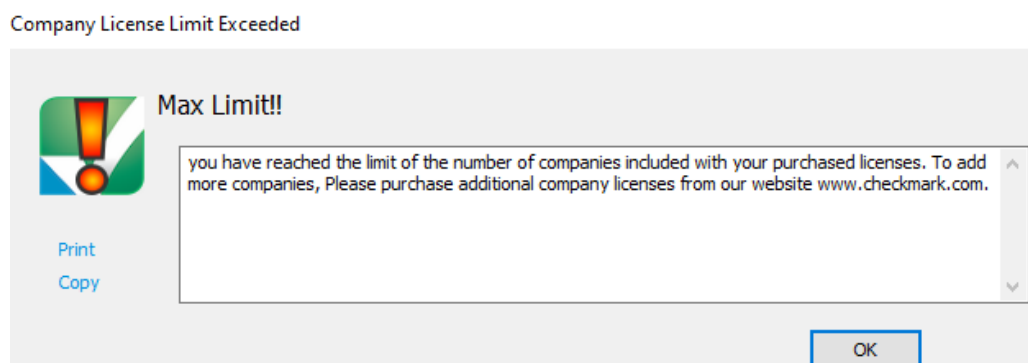
Company Name

Warning: Please ensure that the entered Company Name is correct. Once you save this information, it cannot be modified. Proceed with caution!

4. Click **OK** after entering the details.
5. You will be taken to the webpage for employer validation. Once the validation is complete, close the webpage, and the employer will be added to the employer list.



6. If you do not have a license to add additional companies, an alert will appear when the employer limit is reached.



7. Click **OK**, and you'll be taken to a webpage to purchase additional employer licenses.

Buy Additional Companies

Buy Additional Companies

1. Selected Application

CheckMark 1095 EFile - Additional C

2. Add Additional Companies (\$30 Each)

-

1

+

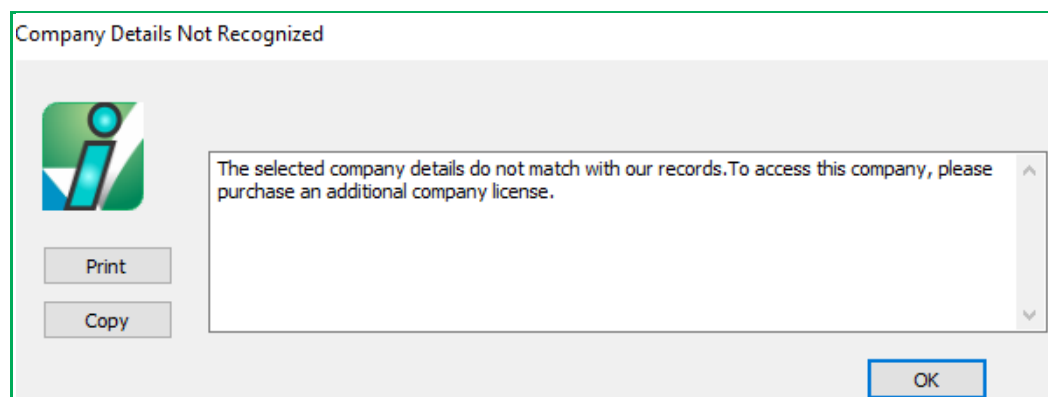
Order Summary

Additional Company	\$ 30
Order Total	\$ 30

PROCEED

8. On the webpage, select the number of additional companies needed, each costing \$30, and then click **PROCEED**. Review your order on the order information page, confirm the details are correct, and click Checkout. On the payment page, enter credit card details and click **Pay** to complete the transaction.
9. After the payment is successful, go back to CheckMark Software the employer will be added to the employer list.

Important: Every time a new employer is added, it will be validated by taking you to a webpage. If you have already purchased the employer, it will confirm that the employer has been added successfully. If the employer has not yet been purchased, you will be taken to the webpage for purchase. An alert message will prompt you to validate the employer if it is not registered in our database; click **OK** to proceed.

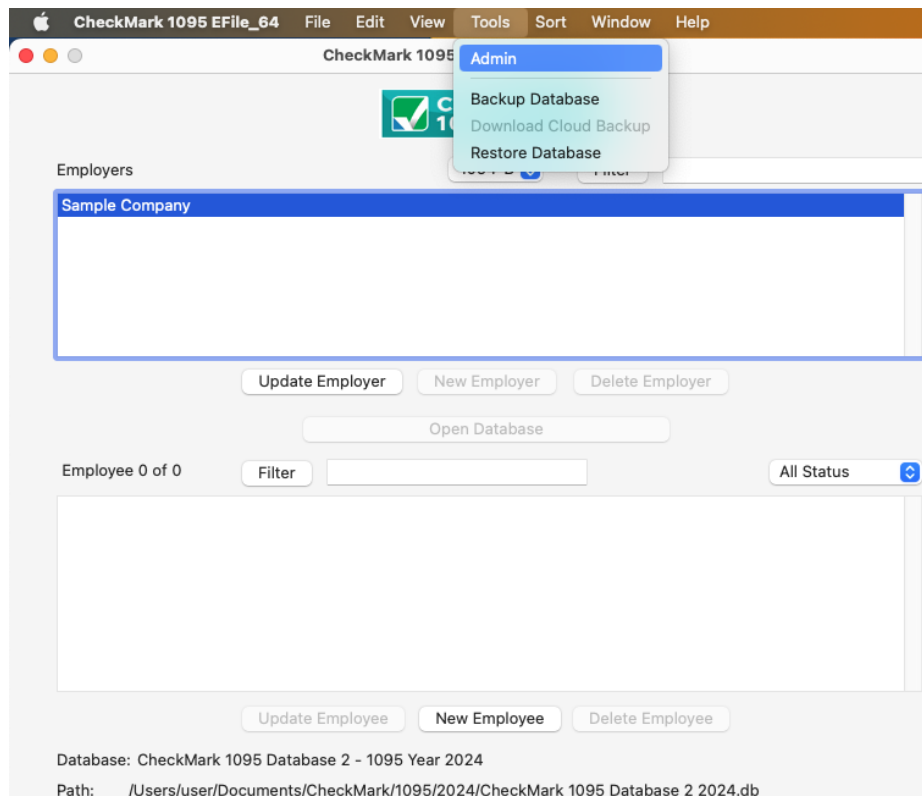


Chapter 4 Set Up

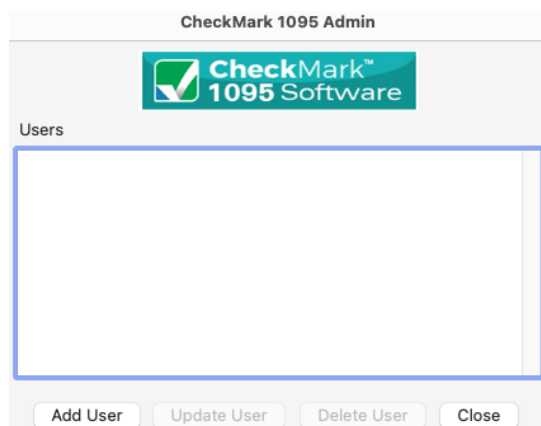
Setting up Users and Passwords

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 upper left hand corner of the screen and select **Admin**.



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



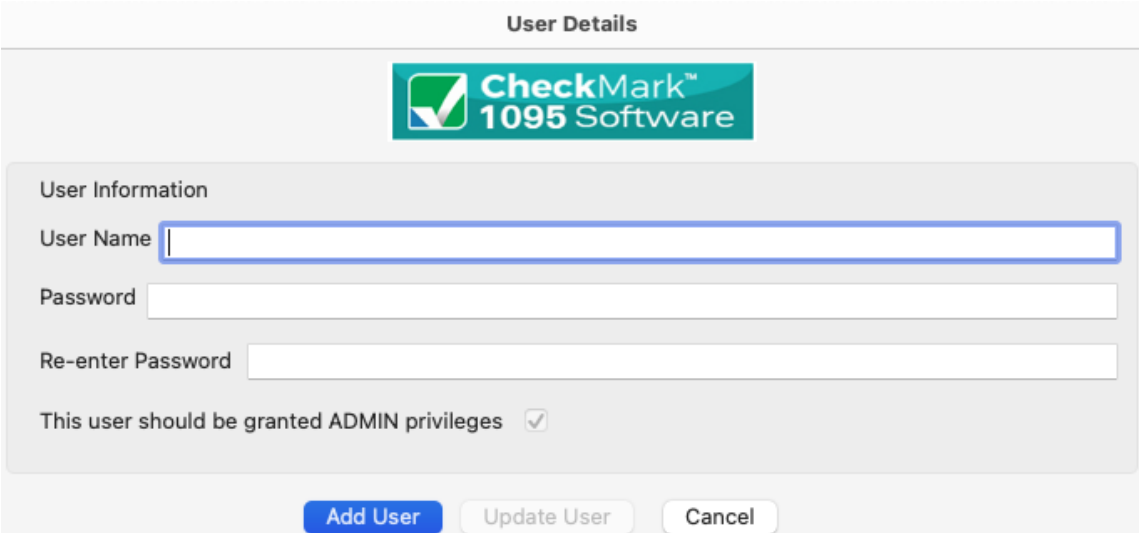
3. Enter the **Name** and **Password**.

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.



The screenshot shows a 'User Details' window for 'CheckMark™ 1095 Software'. It contains a 'User Information' section with three text input fields: 'User Name', 'Password', and 'Re-enter Password'. Below these fields is a checkbox labeled 'This user should be granted ADMIN privileges' which is checked. At the bottom of the window are three buttons: 'Add User' (highlighted in blue), 'Update User', and 'Cancel'.

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

Updating Users

1. Click on the **Tools** menu in the upper left hand corner of the screen 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 upper left hand corner of the screen 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.



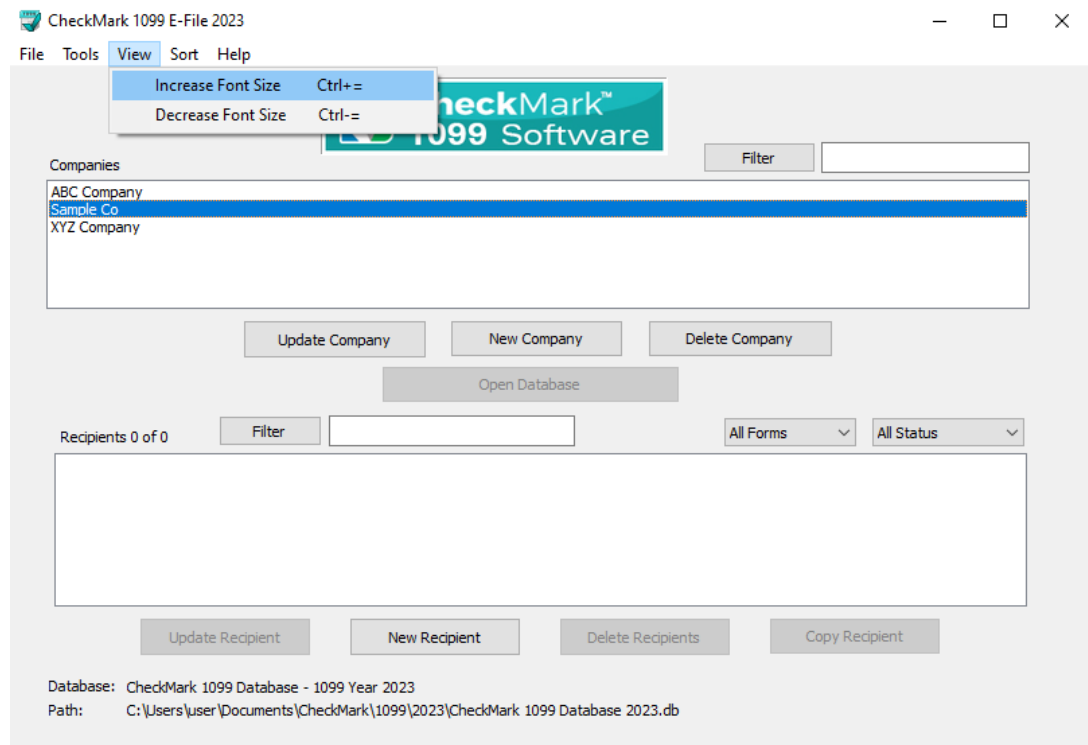
Note: If you delete all users, the software will not prompt for a password upon launching the program.

Setting Screen Font Size

This setting allows you to customize how big or small you want the font on the screen in the program. There are five settings to choose from: **Smallest Font, Small Font, Medium Font, Large Font, And Largest Font.**

Selecting Font Size

1. Click on the Font Sizes menu at the top of the screen.
2. Select which font you want to use. You can choose any font at anytime from the main screen window.



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.

Company Information

CheckMark™ 1099 Software

Payer Information

1.Payer's Name: Sample Co

2.Payer's Federal ID: 00-0000000

3.Payer's Address: 205 Old Town Sq

4.Payer's City: Foco

5.Payer's State: Colorado-CO

6.Payer's ZIP: 80529

7.Payer's Phone: 970-555-0001

Contact Information

1.Contact Person: Pete Peters

2.Contact's Phone: 970-555-0001

3.Contact's Email Address: omgitsbrian@gmail.com

4.Contact's Fax Number: 970-555-0002

☐ Tax ID is Social Security Number

☐ This is your FINAL RETURN

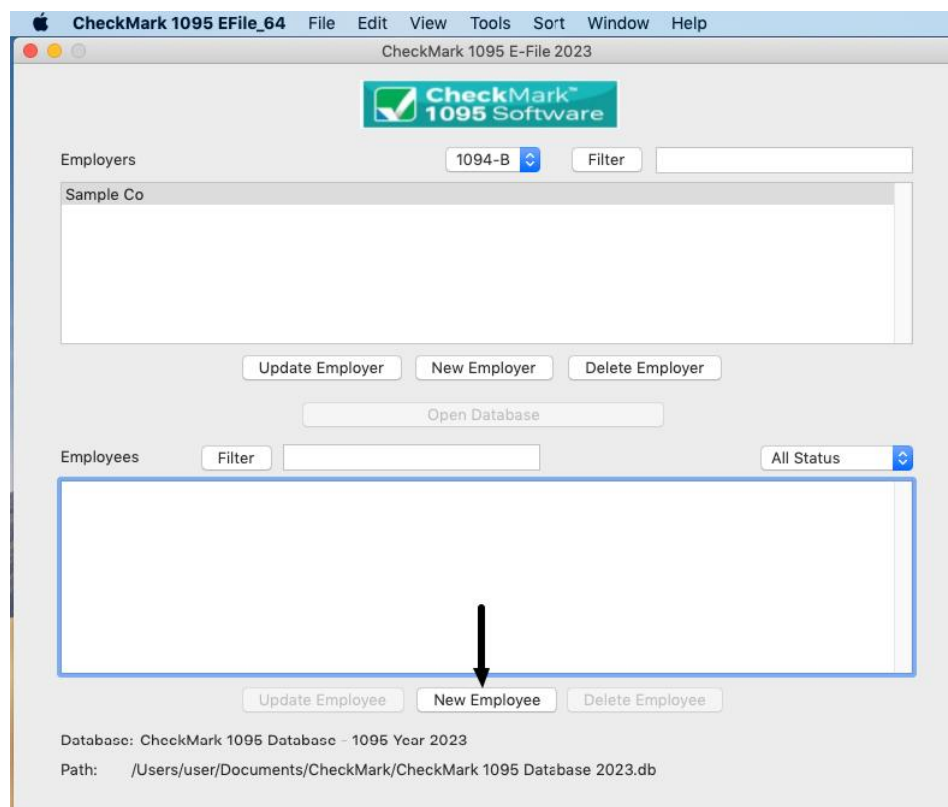
Add Company Update Company Cancel

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 employee. If no Database exists you must first create one. See [Create New Database](#).
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](#).
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

☐ VOID
☐ CORRECTED

OMB No. 1545-2252
 2024
 Form 1095-B

Update Employee
Add Employee
 Cancel

Previous Employee
Next Employee

Instructions
General Information
Covered Individuals

Responsible Individual

☐ Address not in US Territory

1a. First Name of responsible individual *

1b. Middle Name of responsible individual

1c. Last Name of responsible individual *

2. Social security number (SSN or other TIN) *

3. Date of Birth (If SSN or other TIN is not available) YYYY-MM-DD

4. Street address (including apartment no.)*

5. City or town *

6. State or province * None

7a. Country * US

7b. ZIP or foreign postal code *

8. Enter letter identifying Origin of the Health Coverage.. (A - G or a-g) *

☐ Employer self-insured group health plan coverage

9. Reserved

Information about Certain Employer-Sponsored Coverage

☐ Copy Employer Information

10. Employer Name

11. Employer identification number (EIN)

12. Street address (including room or suite no.)

13. City or town

14. State or province

15a. Country US

15b. ZIP or foreign postal code

Issuer or Other Coverage Provider

16. Name

17. Employer identification number (EIN)

18. Contact telephone number

19. Street address (including room or suite no.)

20. City or town

21. State or province

22a. Country US

22b. ZIP or foreign postal code

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

The following errors were discovered:

Employee's Last Name: Must be between 1 and 22 characters.

Employee's SSN: Must be of form XXX-XX-XXXX or XXXXXXXXXX and if DOB is blank then SSN is must.

Employee's DOB is not required if SSN is given.

Employee's Address: Must be between 1 and 35 characters.

Employee's City: Must be between 1 and 22 characters.

Employee's State: Please select a State or Province.

Employee's ZIP: Must be of form XXXXX or XXXXX-XXXX.

Employee's 'Origin of the Policy' must be of any value from 'A' to 'G' or '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 50.

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.
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](#).

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 e-File](#).

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.
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](#).

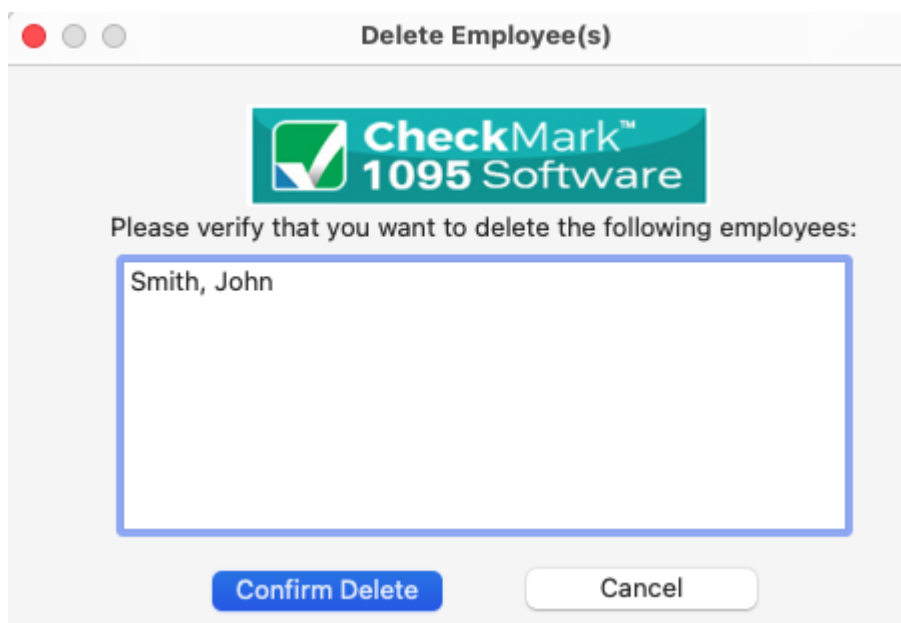
If you initially e-Filed, create a new .txt file with that employee and updated Corrected information and submit it to the IRS. For information on e-Filing, see [Creating a file to e-File](#).

Deleting a 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](#).

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.

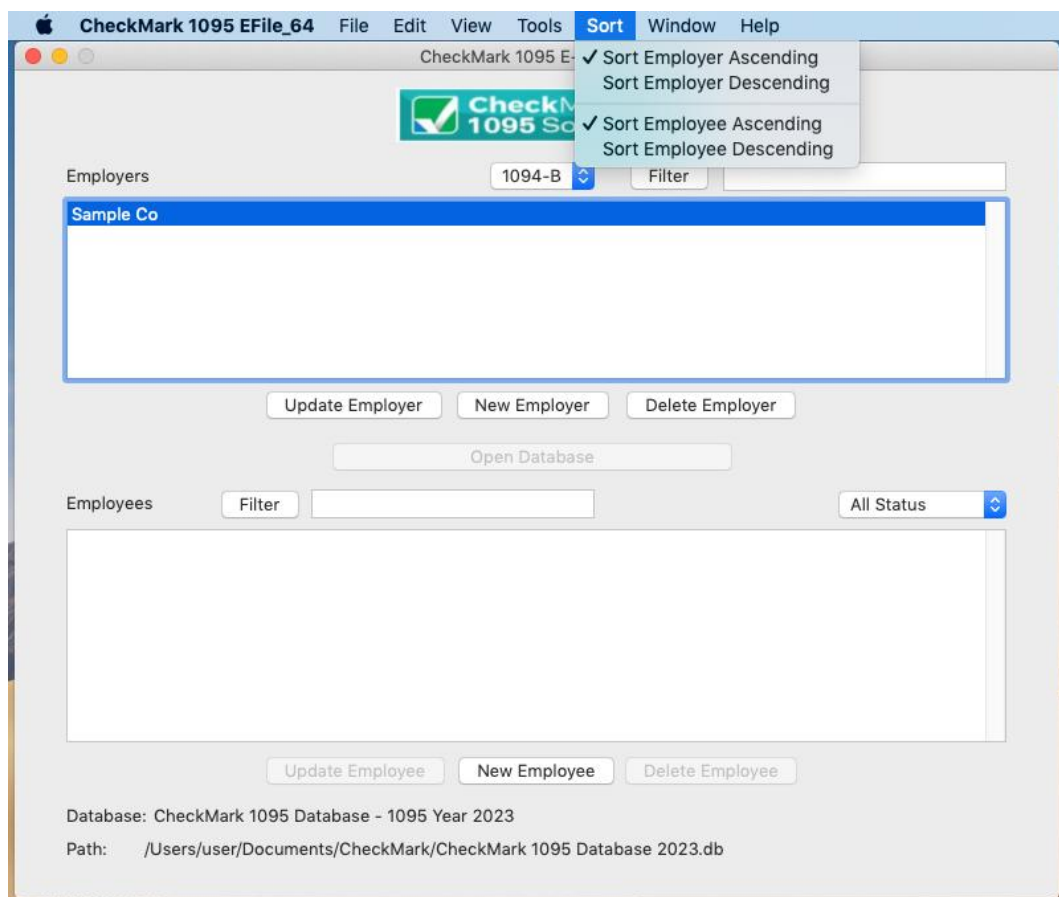
Filtering Employees

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.

The screenshot displays the 'CheckMark 1095 E-File 2023' application window. At the top, there is a logo for 'CheckMark 1095 Software'. Below the logo, the 'Employers' section features a dropdown menu set to '1094-B', a 'Filter' button, and a text input field containing 'sample co'. Below this is a large empty text area. Underneath the text area are three buttons: 'Update Employer', 'New Employer', and 'Delete Employer'. A button labeled 'Open Database' is centered below these. The 'Employees' section has a 'Filter' button, a text input field, and a dropdown menu set to 'All Status'. Below this is a list of employee names: 'Dylan, Robert', 'Jagger, Mick' (highlighted in blue), and 'Jett, Joan'. Below the list are three buttons: 'Update Employee', 'New Employee', and 'Delete Employee'. At the bottom of the window, the database information is shown: 'Database: CheckMark 1095 Database - 1095 Year 2023' and 'Path: /Users/admin/Documents/CheckMark/1095/2023/CheckMark 1095 Database 2023.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 a 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.

The screenshot shows the 'CheckMark 1095 E-File 2023' application window. At the top, there is a logo for 'CheckMark 1095 Software'. Below the logo, there is a section for 'Employers' with a dropdown menu showing '1094-B', a 'Filter' button, and a text input field. Below this, there is a list of employers, with 'sample co' visible. Below the list, there are buttons for 'Update Employer', 'New Employer', and 'Delete Employer', and an 'Open Database' button. Below the 'Employers' section, there is a section for 'Employees' with a 'Filter' button, a text input field, and a dropdown menu showing 'All Status'. Below this, there is a list of employees: 'Dylan, Robert', 'Jagger, Mick', and 'Jett, Joan'. The first three employees are highlighted in blue, indicating they are selected. Below the list, there are buttons for 'Update Employee', 'New Employee', and 'Delete Employee'. At the bottom, there is a status bar showing the database name 'CheckMark 1095 Database - 1095 Year 2023' and the path '/Users/admin/Documents/CheckMark/1095/2023/CheckMark 1095 Database 2023.db'.

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.

The screenshot displays the 'CheckMark 1095 E-File 2023' application window. At the top, there is a logo for 'CheckMark 1095 Software'. Below the logo, the 'Employers' section features a dropdown menu set to '1094-B', a 'Filter' button, and a text input field containing 'sample co'. Underneath the employer list are buttons for 'Update Employer', 'New Employer', and 'Delete Employer', along with an 'Open Database' button. The 'Employees' section has a 'Filter' button, a text input field, and a status dropdown menu set to 'All Status'. A list of employees is shown below: 'Dylan, Robert', 'Jagger, Mick', and 'Jett, Joan'. The first and third items are highlighted in blue, indicating they are selected. Below the list are buttons for 'Update Employee', 'New Employee', and 'Delete Employee'. At the bottom, the database information is displayed: 'Database: CheckMark 1095 Database - 1095 Year 2023' and 'Path: /Users/admin/Documents/CheckMark/1095/2023/CheckMark 1095 Database 2023.db'.

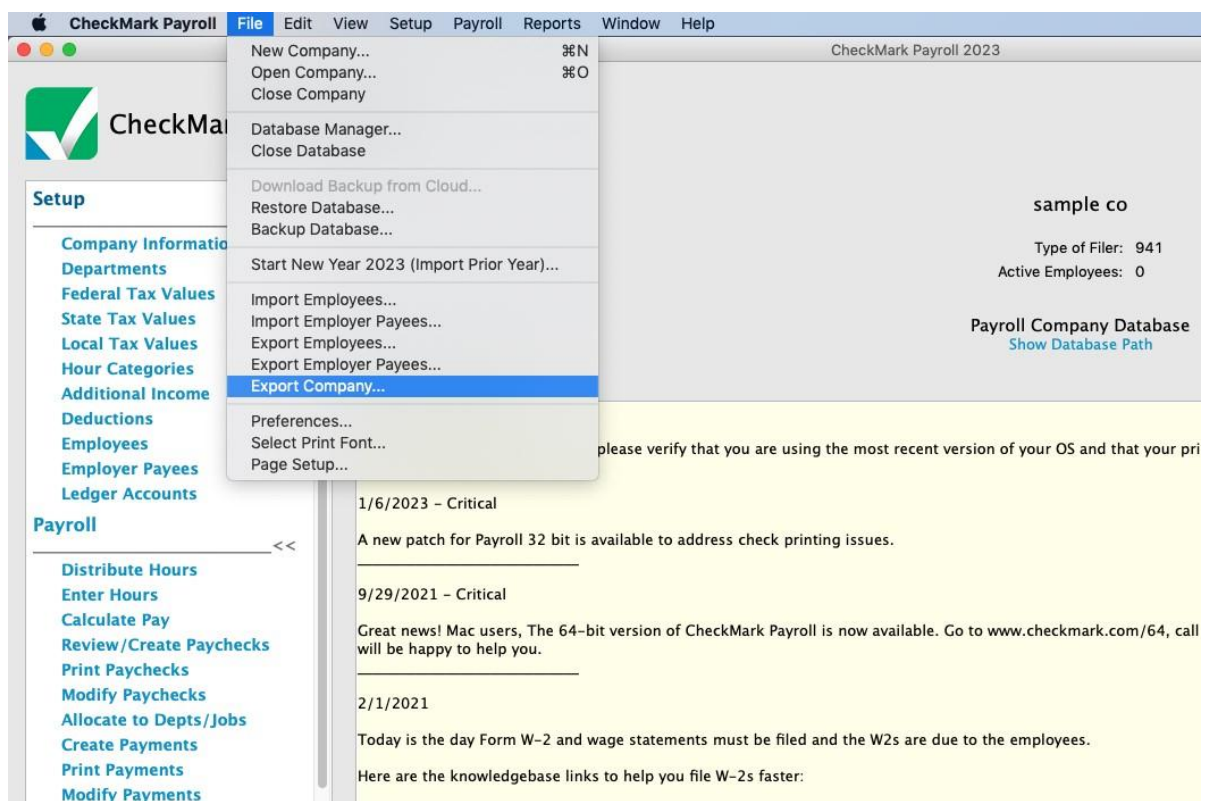
Chapter 6 Exporting and Importing

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 up CheckMark Payroll, under **File** menu and choose **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 Company Information from MultiLedger

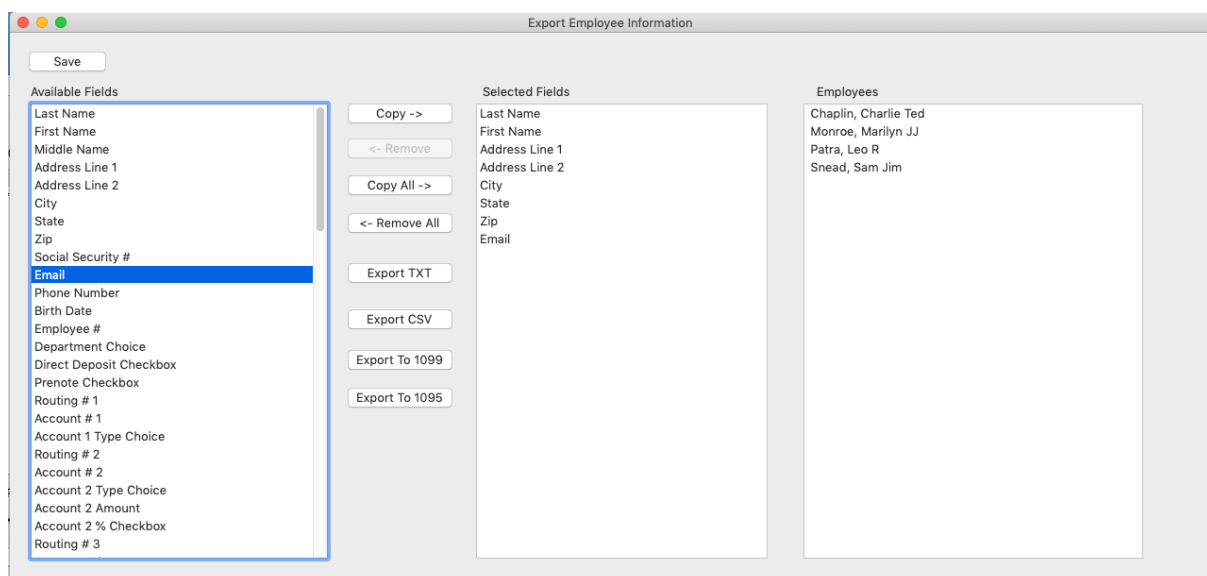
1. Open the MultiLedger; under the **File** menu select **Export Company...**
2. A save dialogue box appears. In the File name field, give the file a name if needed and choose a location to save the file to, an example would be your desktop.
3. Click **Save**.

Exporting Employees from CheckMark Payroll

1. Open CheckMark Payroll, under **File** menu and choose **Export Employees**.
2. Select the fields that 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. For 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. Click **Save**.

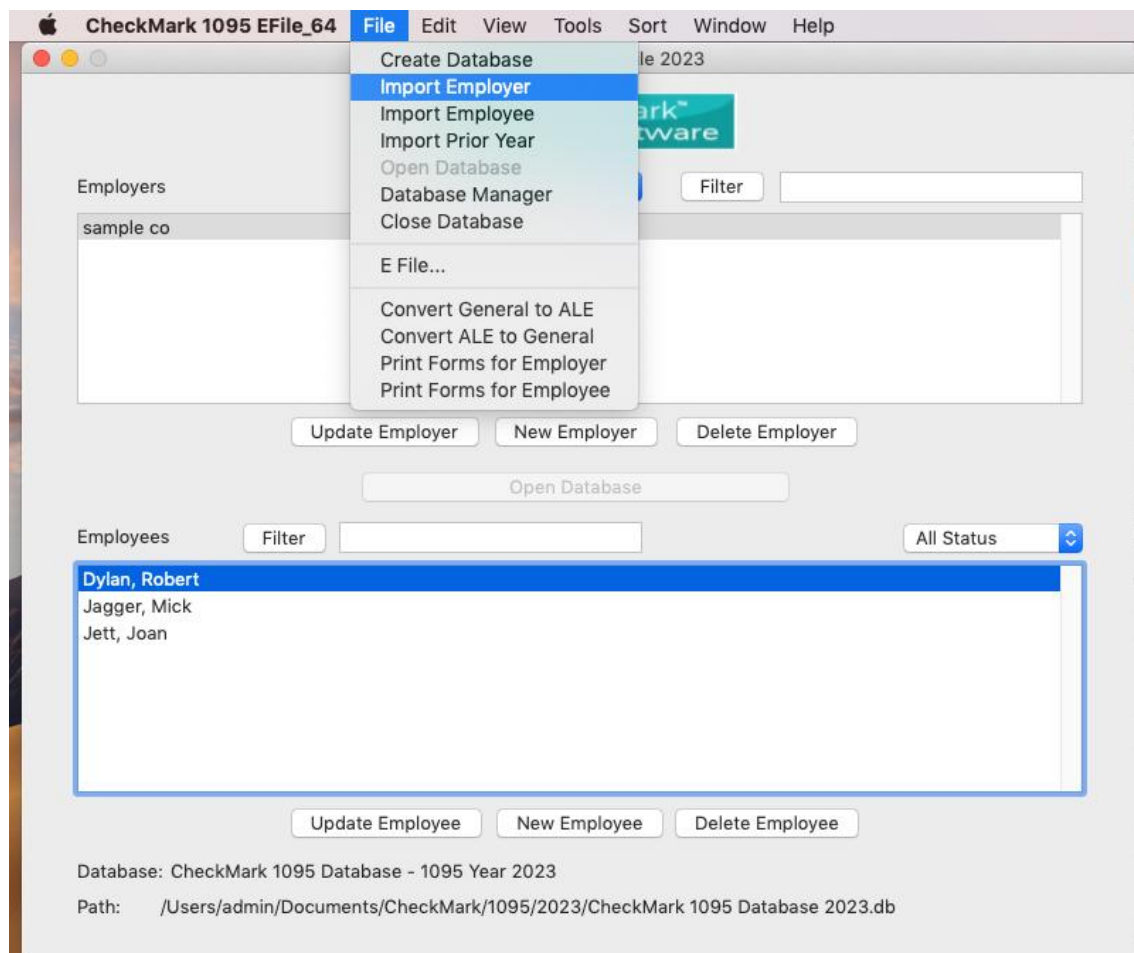
Importing Employer information from CheckMark

Payroll or MultiLedger

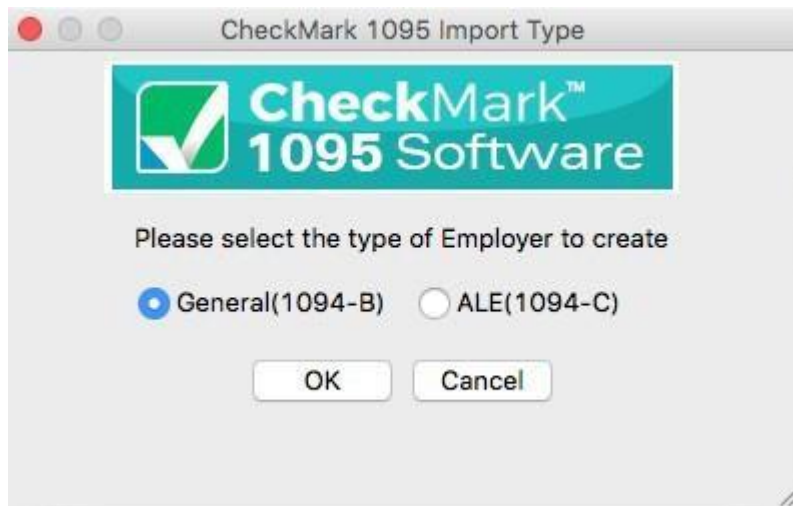
1. Open the CheckMark 1095 application.
2. Open the Database which contains the employer you want to import into.

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 employer or importing a employer, see [Creating a New](#) .

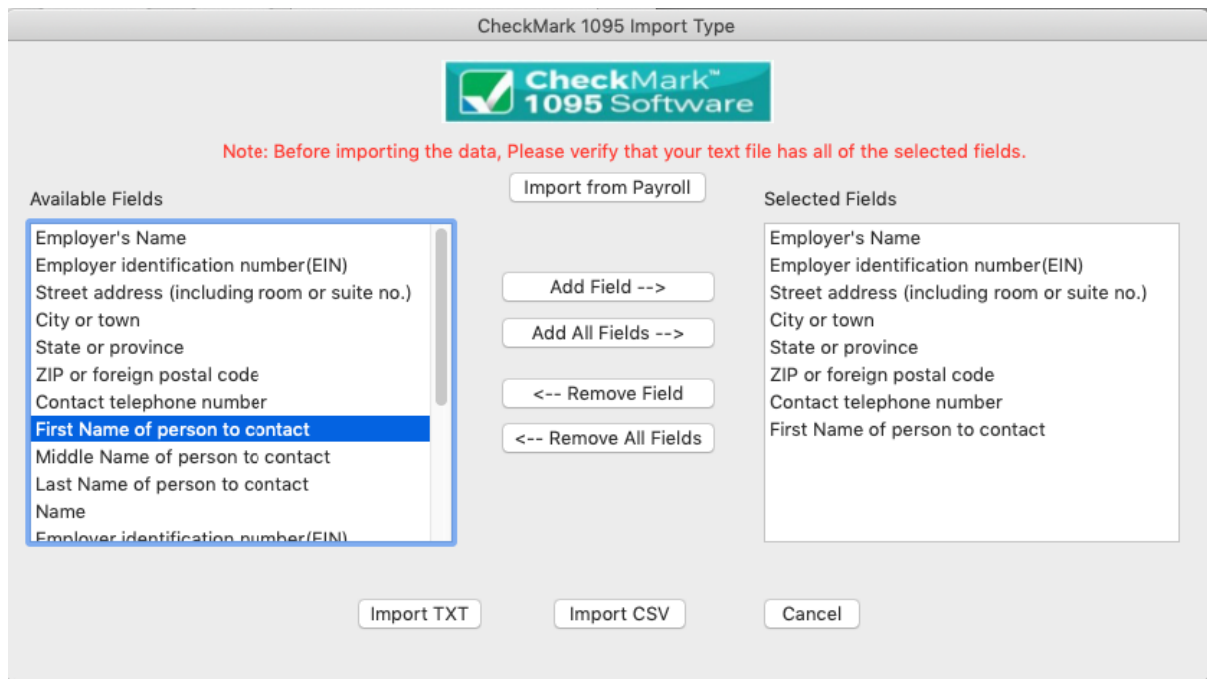
3. Under the **File** menu select **Import Employer**.



4. Choose the type employer you are importing and then click **OK**.



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



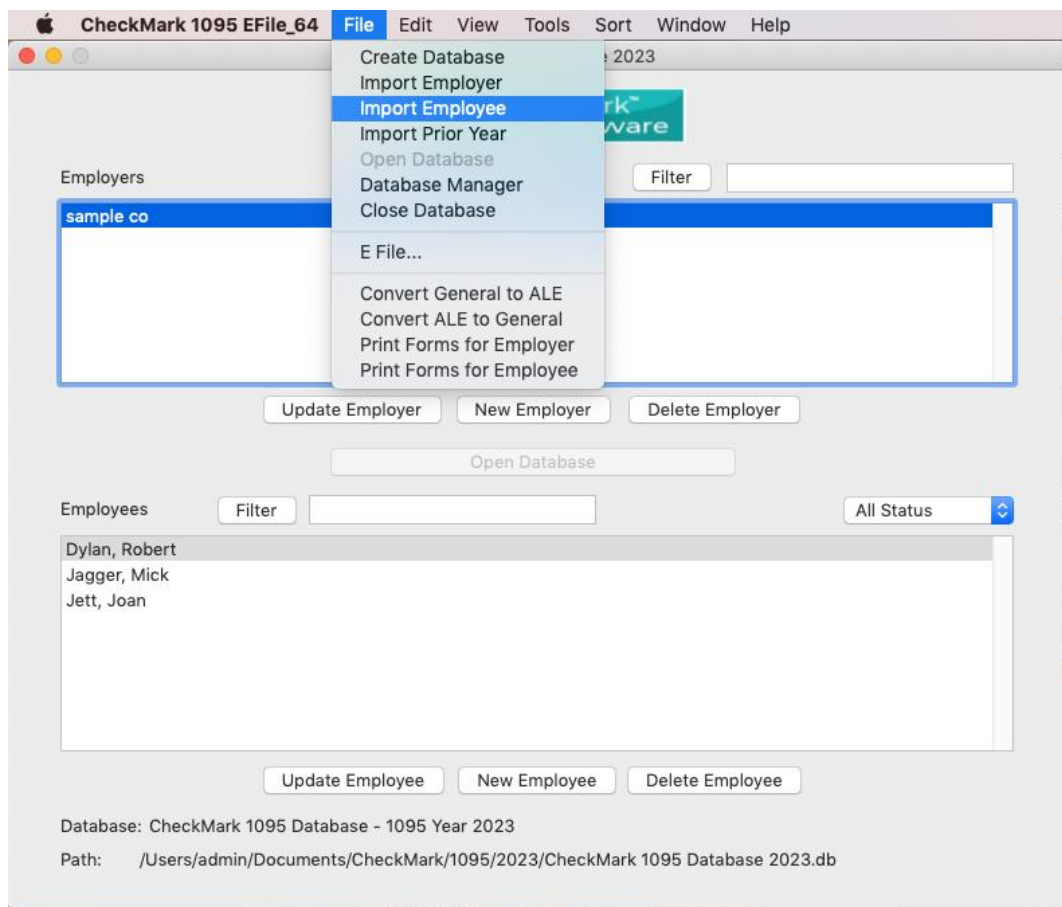
6. A dialogue box appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.
7. Select the text file and click Open. The employer will be imported into the selected database.

Importing a 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 an employer before importing employees. For information on creating a new employer or importing an employer, see [Creating a New Employer](#).

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



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.

CheckMark 1095 Import Type

CheckMark™ 1095 Software

Note: Before importing the data, Please verify that your text file has all of the selected fields.

Available Fields

- First Name of responsible individual
- Middle Name of responsible individual
- Last Name of responsible individual
- Street address (including apartment no.)
- City or town
- State or province
- ZIP or foreign postal code
- Social security number(SSN or other TIN)
- Date of birth(If SSN or other TIN is not available)
- Enter letter identifying Origin of the Health Coverage..
- Employer self-insured group health plan coverage
- First Name of CoveredIndividual1

Import from Payroll

Add Field -->

Add All Fields -->

<-- Remove Field

<-- Remove All Fields

Selected Fields

- First Name of responsible individual
- Middle Name of responsible individual
- Last Name of responsible individual
- Street address (including apartment no.)
- City or town
- State or province
- ZIP or foreign postal code
- Social security number(SSN or other TIN)
- Date of birth(If SSN or other TIN is not available)
- Enter letter identifying Origin of the Health Coverage..

Import TXT

Import CSV

Cancel

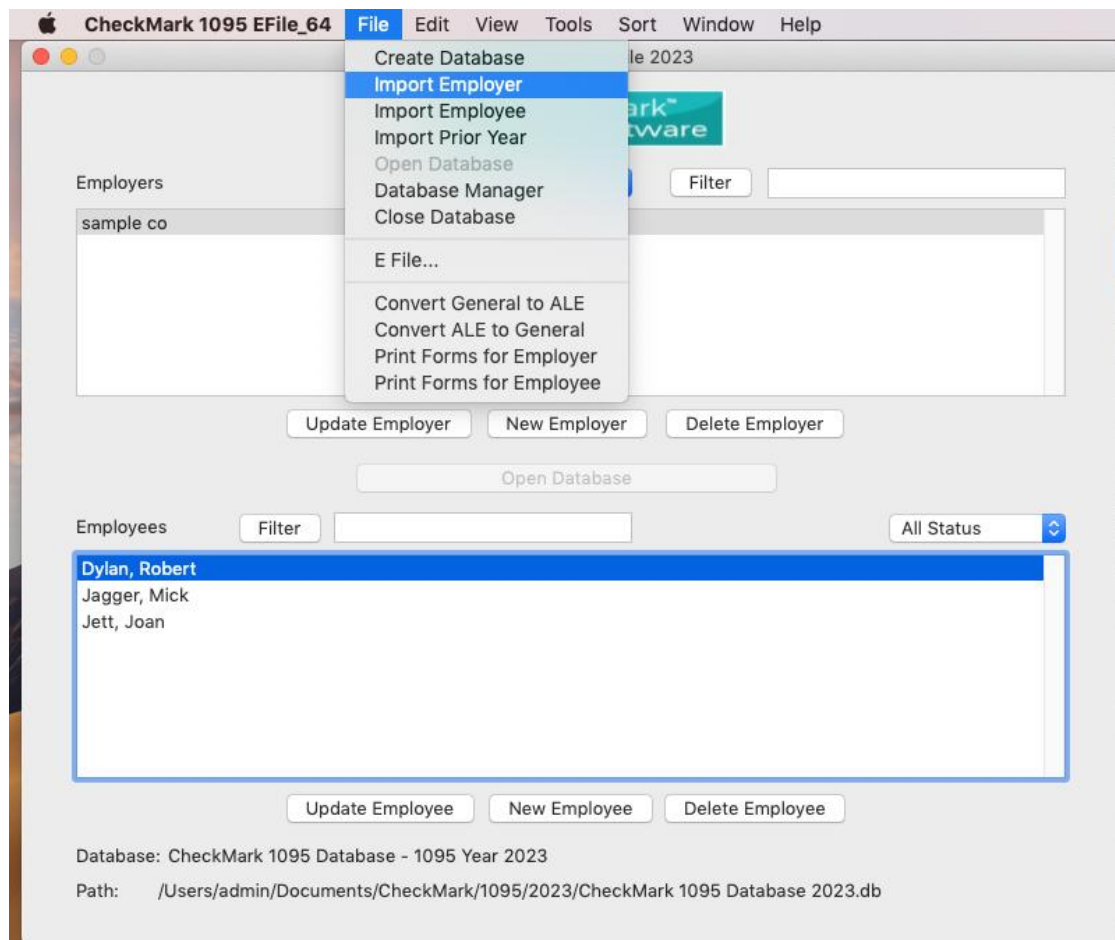
8. A dialogue box appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.
9. Select the text file and click **Open**. All employees will be imported into the selected employer.

Importing using a tab-delimited text file

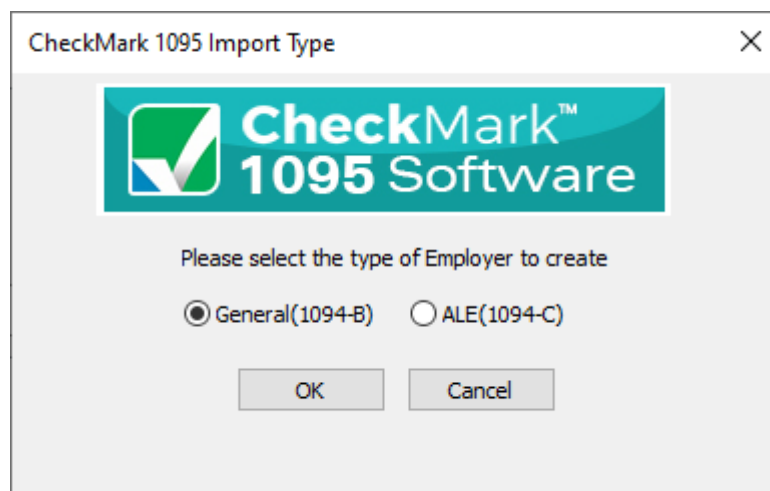
1. Open up the CheckMark 1095 application.
2. Open the Database which contains the employer you want to import into.

Note: If the employer you want to import employees to does not exist, you will need to create a new employer or import a employer before importing employees. For information on creating a new employer or importing a employer, see [Creating a New](#) or “Importing a Employer”.

3. Go under the **File** menu and select **Import Employee** or **Import Employer**.



4. Select **Employee** or **Employer** in the popup window.
5. If you choose **Import 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**.

The screenshot shows a software window titled "CheckMark 1095 Import Type". At the top is the "CheckMark 1095 Software" logo. Below the logo is a red note: "Note: Before importing the data, Please verify that your text file has all of the selected fields." The window is divided into two main sections: "Available Fields" on the left and "Selected Fields" on the right. In the "Available Fields" list, "First Name of person to contact" is highlighted. Between the two lists are four buttons: "Import from Payroll", "Add Field -->", "Add All Fields -->", "<-- Remove Field", and "<-- Remove All Fields". The "Selected Fields" list on the right contains the same fields as the "Available Fields" list, including "First Name of person to contact". At the bottom of the window are three buttons: "Import TXT", "Import CSV", and "Cancel".

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 & 1095 Forms

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

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

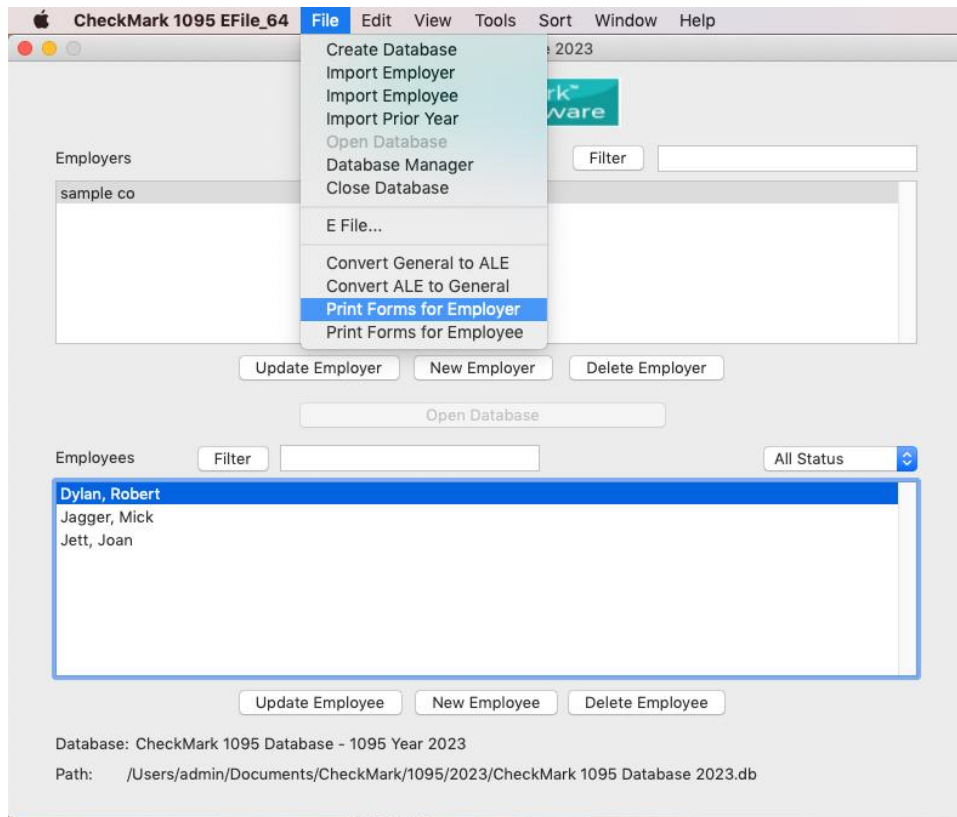
IMPORTANT: You must install the latest version of Adobe Reader to print 1094 and 1095 forms properly. Go to www.adobe.com to download the latest update.

Print 1094 Forms and 1095 Form 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 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](#).

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



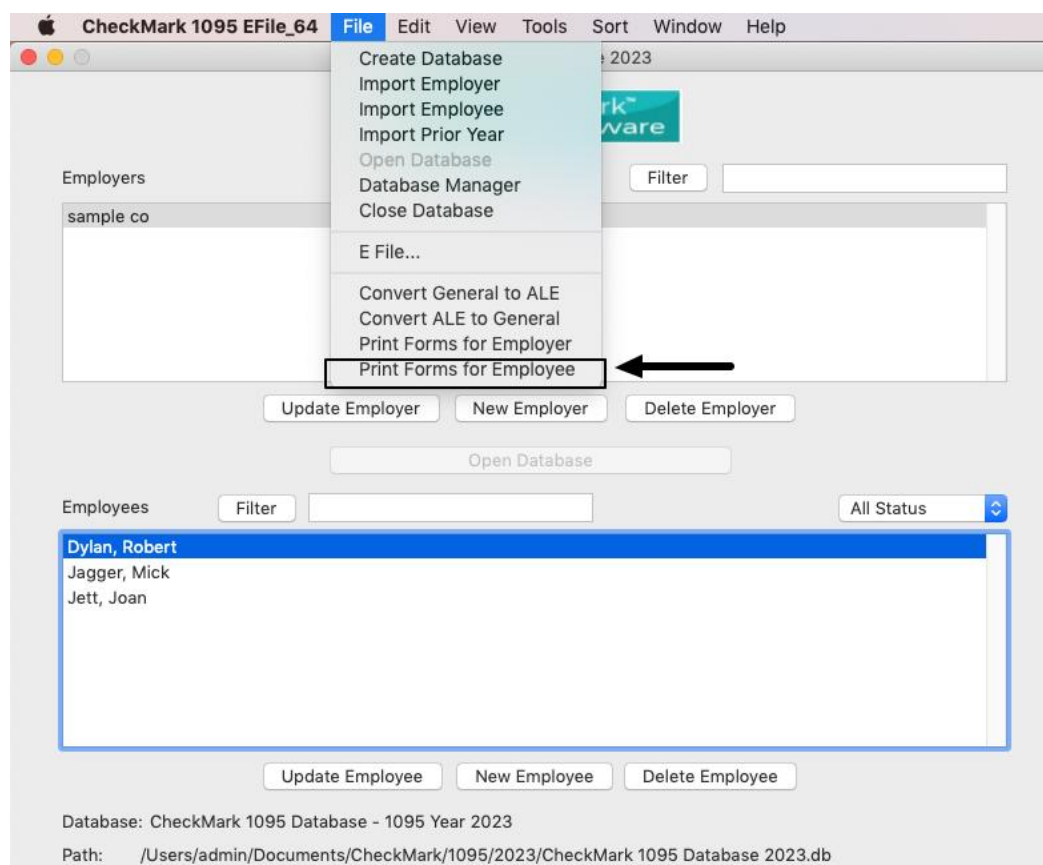
This will bring up the print dialog. You can print to PDF to verify the information before printing the forms or just print the forms. The 1094-B is the Transmittal of Health Coverage Information Returns. This gets sent with the IRS copies of the 1095-B forms for each employee.

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 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](#).

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 e-File

This chapter shows you how to e-File 1095 forms using the IRS ACA Information Returns (AIR) Program. If you have never e-Filed 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 e-File is only available to customers who have purchased the 1095 e-File 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 e-File

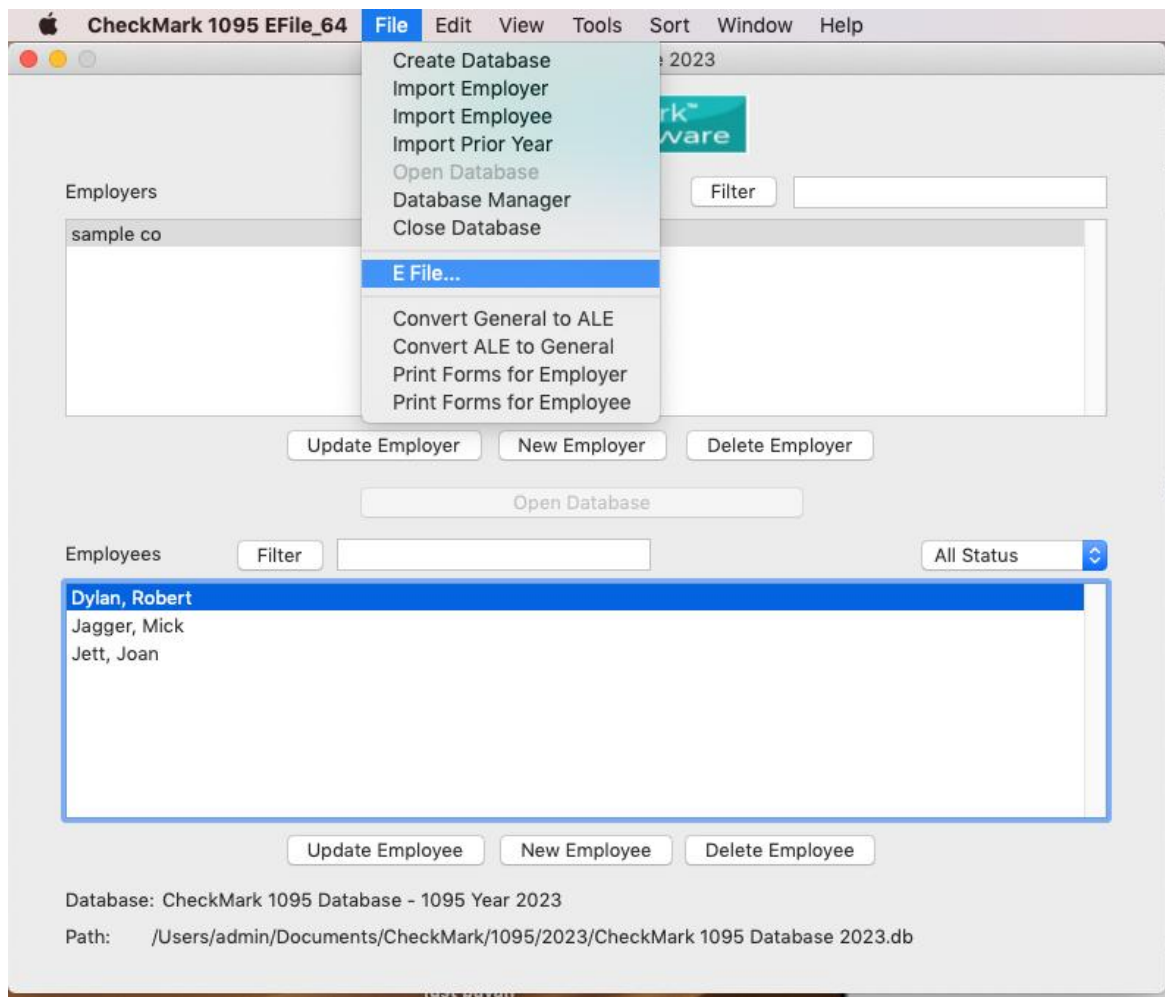
Before creating your first live -e-file to be submitted you must complete a communication test.

1. Select the employer you want to e-File 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](#).

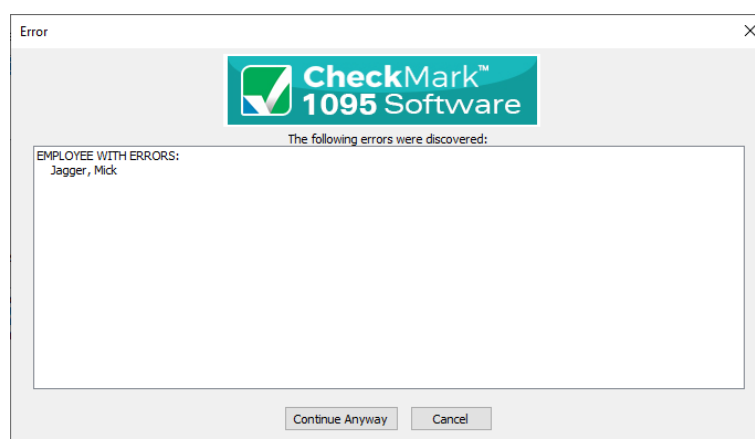
Note: If you do not choose any employees, the e-File option will not be available.

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](#).

3. From the **File** menu, choose **E File**.



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



5. Click **Cancel** to go back and correct there errors. If you feel this box is incorrect then click **Continue Anyway** to continue with creating your e-file.

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

If the address is outside the United States, check the 'Address not in US territory' checkbox, which will allow you to enter details in a text box below the state drop-down. Selecting this checkbox will automatically disable the state drop-down.

Additional Information for E-File

CheckMark™ 1095 Software

Create E-File Now How to E-File Cancel

☒ Address not in Us Territory

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 Replacement Transmission

☐ This is Replacement Submission

☐ This is a Test 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 an AIR system account.

How to E-File

CheckMark™ 1095 Software

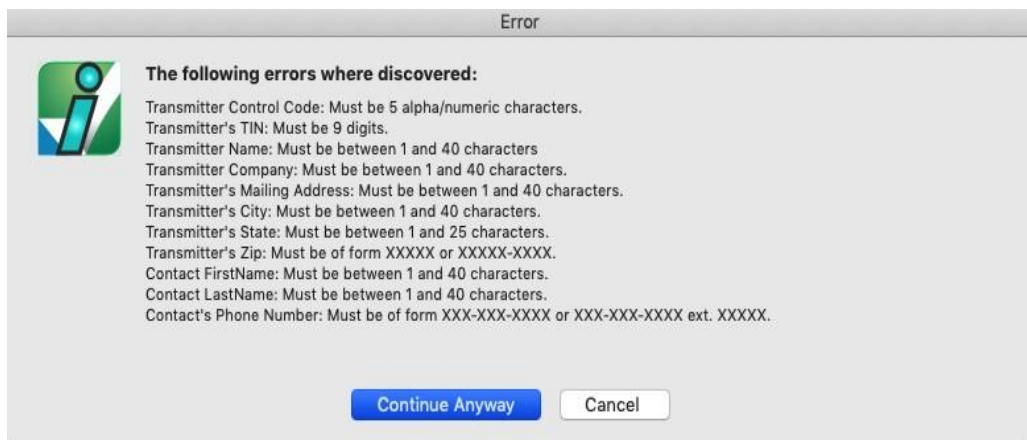
Follow these simple steps for E-Filing

- 1) [Get Form 4423 - Application for ACA Requirements filing electronically \(ACA\)](#)
- 2) [Create ACA System Account](#)
- 3) [Login to your ACA Account](#)
- 4) [Send a Test File!](#)

Close

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

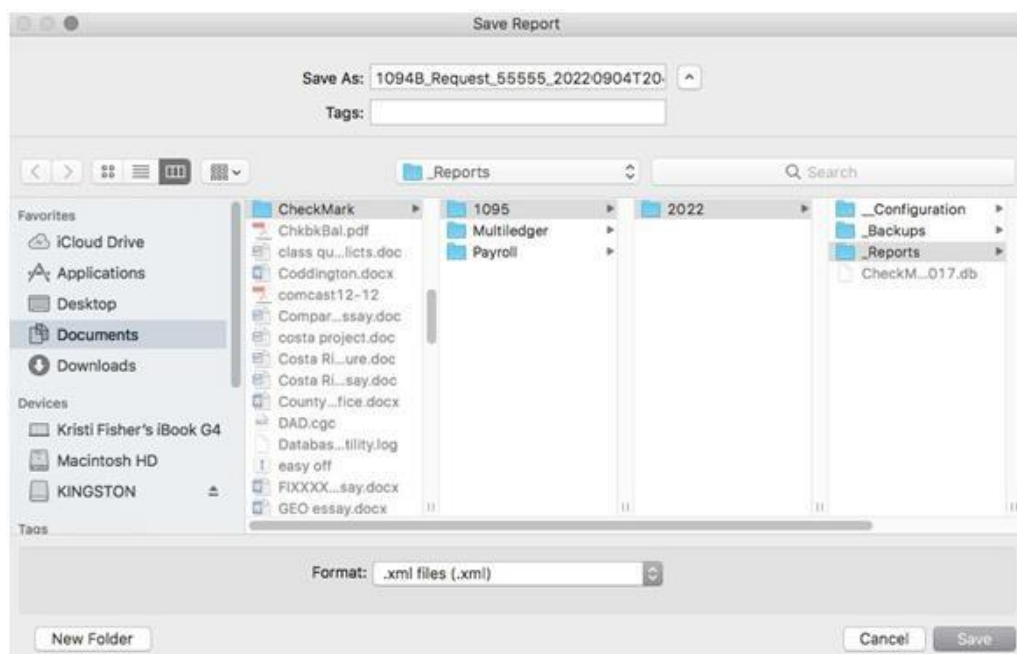
9. If there are any errors in the transmitter information window, you will see a pop-up window explaining what errors occurred.



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.



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 its 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

CheckMark™ 1095 Software Create E-File Now How to E-File Cancel

☒ Address not in Us Territory

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 Replacement Transmission

☐ This is Replacement Submission

☐ This is a Test 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 Create E-File Now How to E-File Cancel

☒ Address not in Us Territory

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 Replacement Transmission
☐ This is Replacement Submission
☐ This is a Test 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.

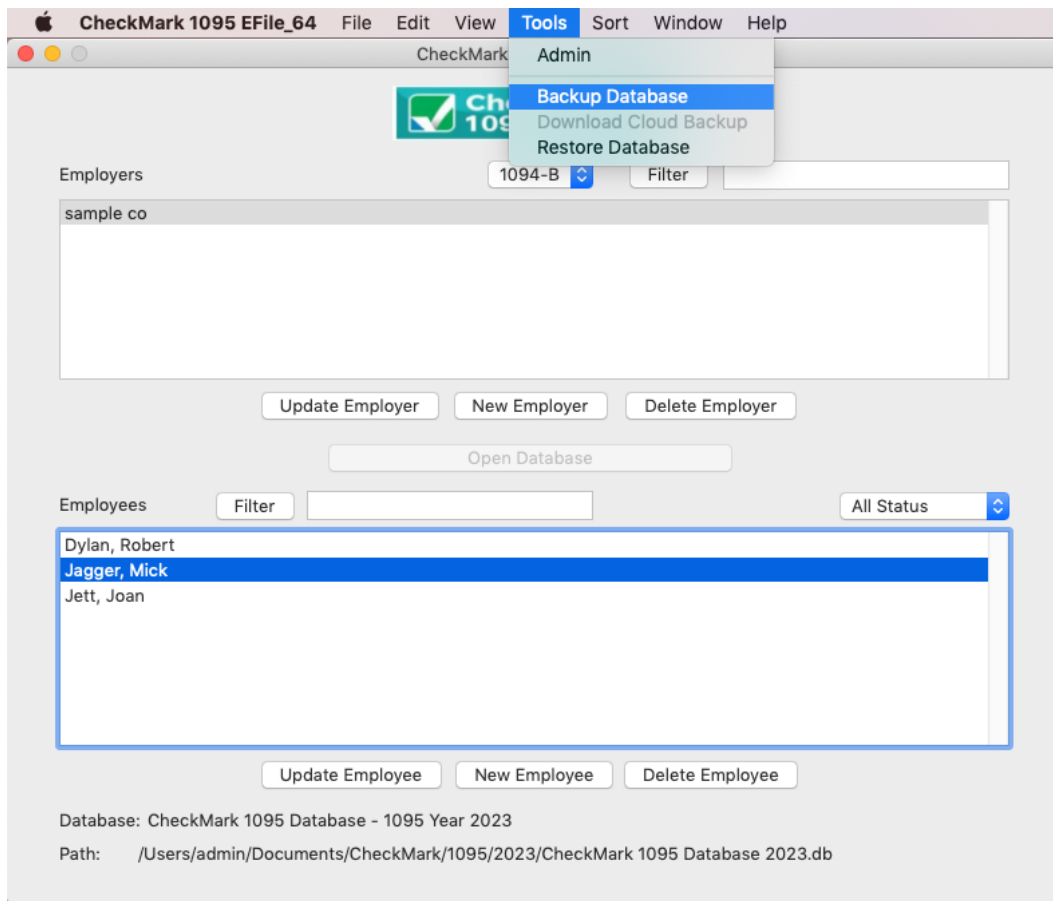
CheckMark 1095 allows you to easily backup your data to any external source for safekeeping.

Backing Up Using the Backup Database Command

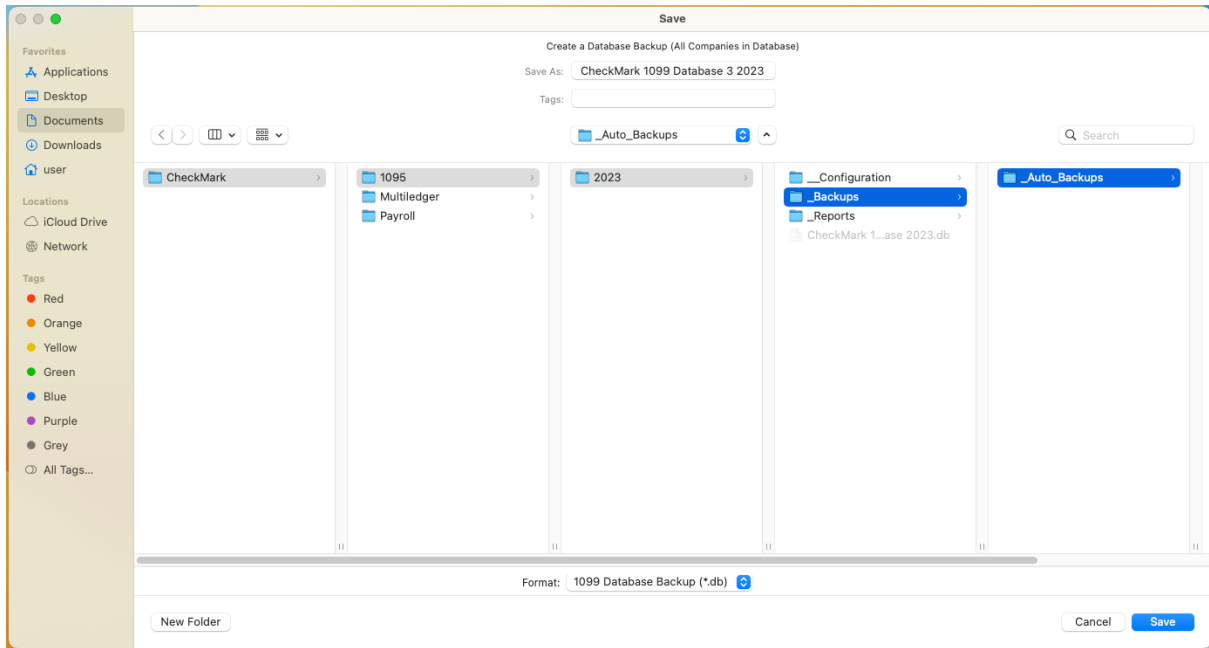
Using the **Backup Database** command within the program allows you to backup a duplicate copy of the database. You can restore this database in case of computer failure or to revert back to a previous database in case of an error in your current database. It is recommended that you make current backup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

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.

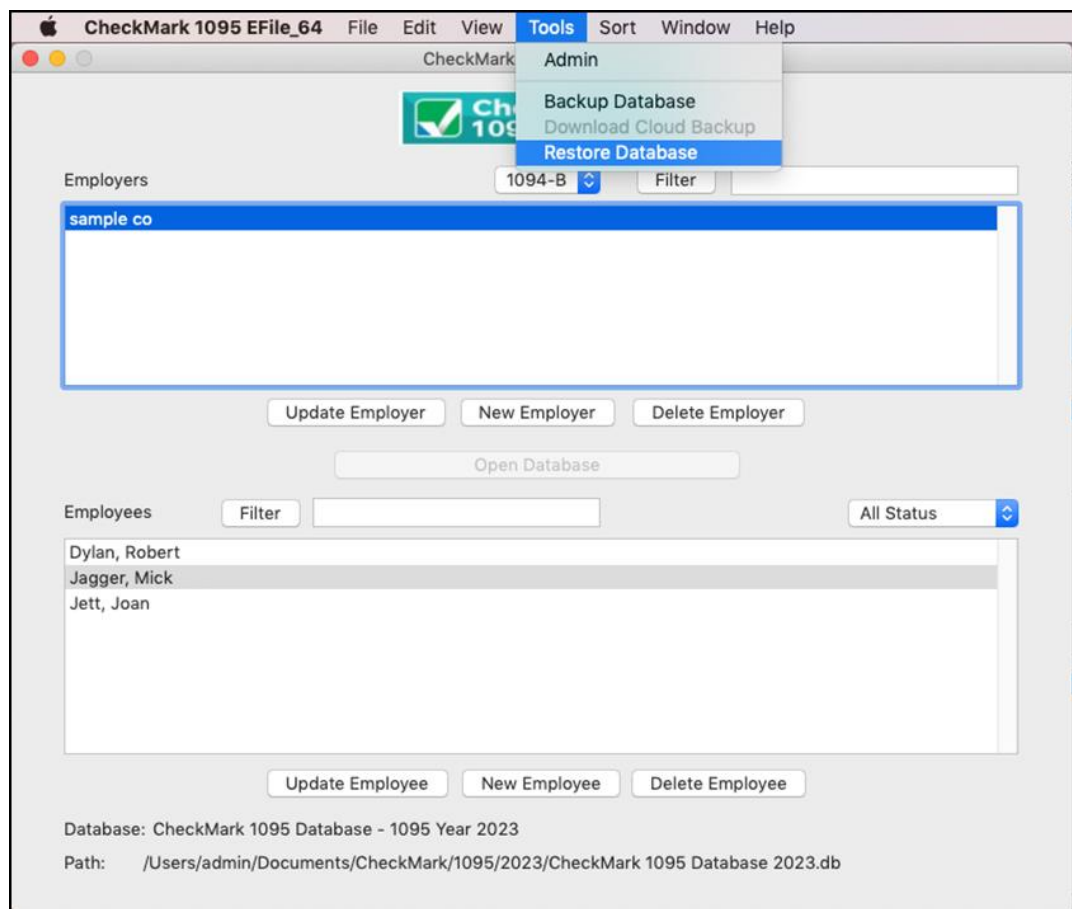


4. Click **Save**.

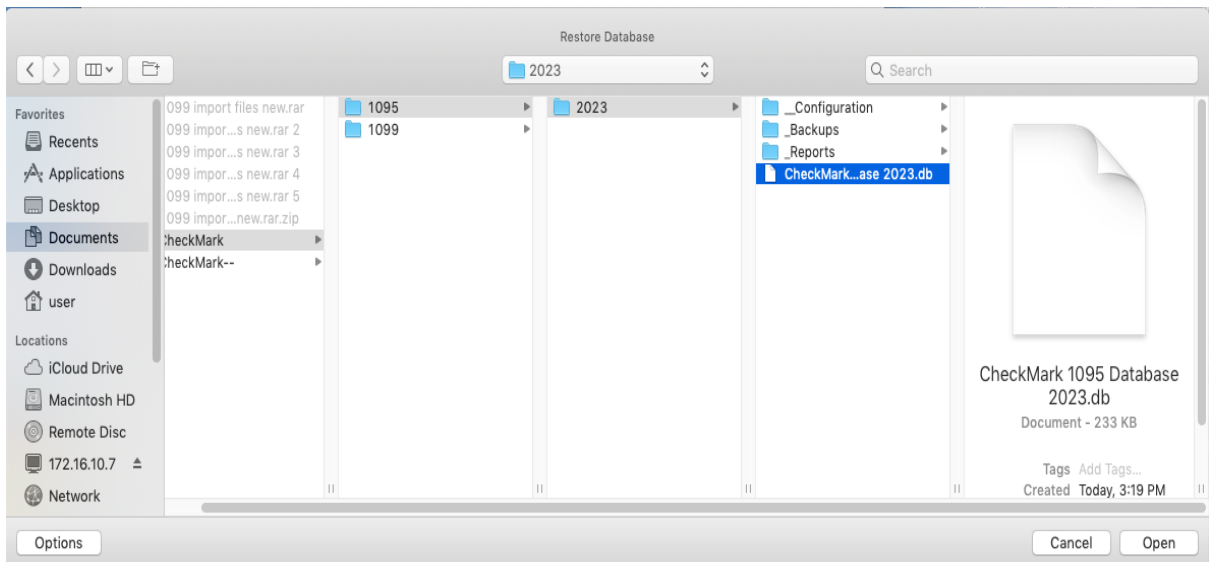
Restoring Database using Restore Database Command

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. You must have a Database created before you can restore a backup.

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.