Hi! I'm Meredith from Texas!

I work in Higher Education/Government. I've been using Workday since before our deployment in 2017.

I handle our Benefits configuration including Open Enrollment and ACA Reporting and Compliance.

We have nearly 40,000 benefit eligible employees & retirees!

I love finding unique ways to configure Workday in unexpected ways using delivered functionality!
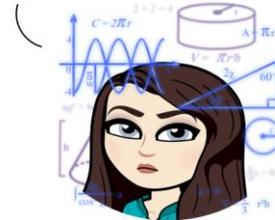
I love helping others brainstorm and troubleshoot their benefits configuration! Speaking of that, it's nearly that time of year for ACA Reporting!
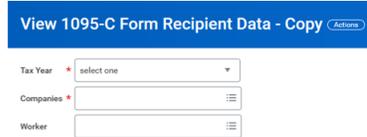
ACA Reporting is everyone's favorite time of the year, right? Here are some tips to make your reporting as painless as possible!

My best advice: Copy the delivered report "View 1095-C Form Recipient Data" and add additional fields:

- Unmasked SSN
- Benefit Group
- Position Information
- Hire/Termination/Retirement Dates
- Calculated fields to display information about the most recent job change

View 1095-C Form Recipient Data - Copy (Actions)

Tax Year ★ select one
Companies ★
Worker

Browse Solutions

Solution: ACA | Configuration Type: ✕ Custom Report
Author | Tag
Company | ID

You can Browse Solutions for ACA to make a copy my custom report!

Export your ACA 1095-C Form Data Report to Excel, then Filter, but DO NOT SORT!

You don't want to orphan those dependent records!

Make any necessary changes to the ACA codes within in the spreadsheet.

Tip: Look at any employees who transferred between your companies or had a benefit group change mid-year.

Once you're ready, the file should include everything you need to copy/paste the data back into the "Import 1095-C Form Recipients Data" EIB template!

Don't forget to include those dependent rows!

Set up a Share-date if you need any help!

The Sharing Show

Meredith

Hello! I'm Meredith. I have been working with Workday for almost 5 years, specializing in Benefits. I work in the Higher Ed area, but a lot of the benefits area isn't industry specific. I love sharing tips, tricks and lessons learned about Go Live, Open Enrollment, benefits configuration (plans, groups, rules, business processes), ACA reporting/compliance, 3rd Party billing and integrations! I dabble in other areas too, and I love talking with others about ways to improve and maximize Workday functionality!

BOOK Meredith Share-date