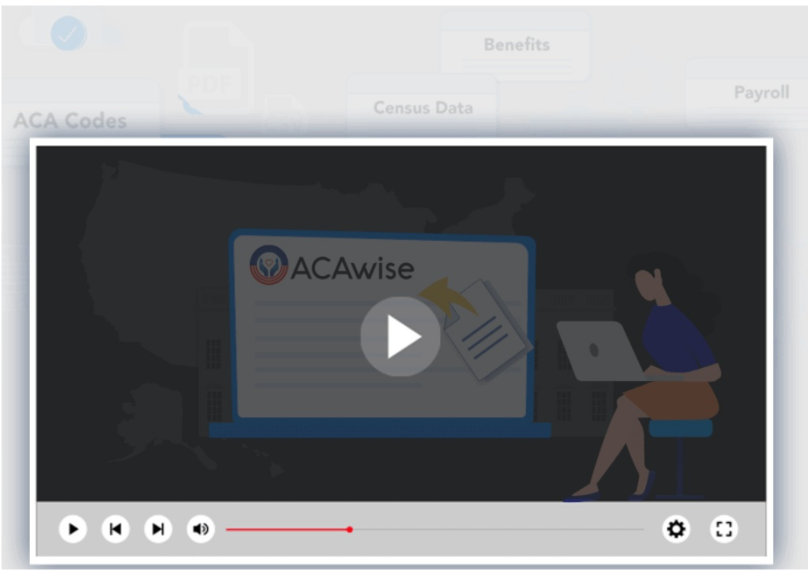
MZQuickFile AN ACA E-Filing Solution Software Instructions

Contents

1 MZQuickFile AN ACA E-Filing Solution Software
2 MZQuickFile Site Navigation Instructions
3 Documents / Resources
  3.1 References
4 Related Posts

MZQuickFile
AN ACA E-FILING SOLUTION

MZQuickFile AN ACA E-Filing Solution Software



MZQuickFile Site Navigation Instructions

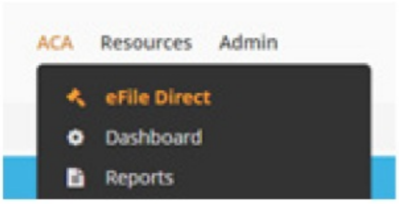
You can follow this link at any time to navigate to the login page for our e-Filing portal.

E-Filing Portal Registration

1. Once you sign up for our service, you'll receive an automated email with a username and temporary password to log into our e-Filing portal.
2. Follow the link to the portal's website that is also included in the automated email to reach the login page for the portal.
3. On the login page, enter the user name and temporary password provided in the automated email.
4. The login page will direct you to a Change Password screen so that you can set up the permanent password you'd like to use with theaccount.
5. The first time you successfully log in, you'll be required to agree to the user terms and conditions.

Navigating to the Data Upload Page
Once you log in and agree to the site's terms and conditions, you should be directed to an eFile Direct page that has a blue "Workforce Tracker" header. If this isn't the case, or if you accidentally click away from the eFile Direct page, follow these instructions to navigate back.

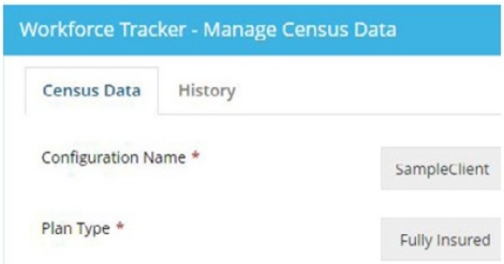
1. At the top center of the page, hover over the ACA option and select eFile Direct from the dropdown menu that appears.



2. This will take you to a page with "Wo rkforce Tracker" as the header. All the fields in this section will be auto-populated for your organization. Please don't make any adjustments to the Tax Year, Config Type, or Config Name fields.
3. Please review the Employer and ALE Status fields to ensure they're accurate.
   - **a**. If your organization was an applicable large employer (ALE) for 2023 and you'll be e-Filing Forms 1094/1095-C, the ALE Status field should read Yes.
   - **b**. If your organization wasn't an ALE for 2023 and you'll be e-Filing Forms 1094/1095-B, the ALE Status field should read No.
4. If the Employer and/or ALE Status fields are incorrect for your organization, please reach out to **mzquickfile@mzqconsulting.com** for assistance.
5. If all the information about your organization in the Workforce Tracker field is accurate, click the purple Data button.

Downloading the Data Template

1. Once you click the purple Data button, a new section on the eFile Direct page titled Workforce Tracker- Manage Census Data should appear.



2. The Configuration Name field should be auto-populated from your registration details, and should match the Config Name in the Workforce Tracker section of this page.
3. The accurate plan type should also already be auto-populated for your organization in the Plan Type field. Of note, level-funded plans are considered self-insured for ACA reporting purposes.
    - **a**. If the Plan Type field is incorrect for your organization, please reach out to **mzquickfile@mzqconsulting.com** for assistance.
4. Click the purple Download Census Data button at the bottom left corner of the page; this will download a blank template for you to complete with the data needed to e-File.

Completing the Data Template

If you see a message at the top of the spreadsheet indicating you're in a PROTECTED VIEW, please click the Enable Editing button so that you can enter information into the template. If you see a SECURITY RISK message related to blocked macros, please disregard it. There should be two tabs in the template you download, a Form 1094 tab and a Form 1095 tab. Please complete all the applicable fields on each tab. You can disregard the orange Validate_Form button at the top of each tab, as the website will conduct an error review when you upload the completed template through the portal.

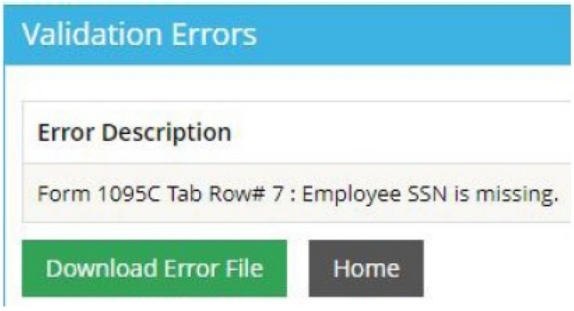
The template is designed to mirror the format of the fields you completed on your organization's 1094 and 1095s (e.g., field 1 on the 1094 tab of the template matches field 1 on the 1094). Every field that you filled out on your 1094 and 1095s should also be filled out in template. If a field is blank on your form/forms because you didn't need to complete it, please also leave that field blank in the template.

Uploading the Data Template

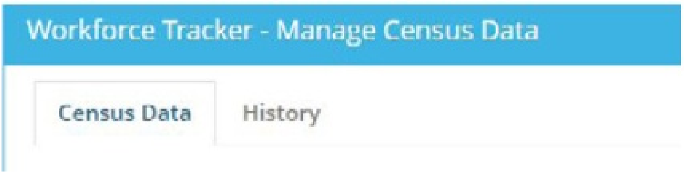
1. Once you've filled out the required tabs on the template, click the blue Upload Census Data button at the bottom left corner of the eFile Direct page. Of note, the system will periodically log you out due to inactivity. If you find that you've inadvertently been logged out, please log back in and navigate back to the eFile Direct page.

2. A pop-up window titled Upload Input Data File For Workforce Tracker should appear.
3. In the pop-up window, click the Choose File button, navigate to where you've saved your completed template, select the file, and click Open.
4. The pop-up window should now display the name of the file you've selected next to the Choose File button. If you accidentally selected the wrong file, click the Choose File button again and select the correct file.
5. Once the correct file is displayed, click the green Upload button in the pop-up window.
    - **a**. If there is an error with your upload, you'll be redirected to a Validation Errors page that will include a list of the error(s) in the file. Please address the error(s) and then follow the instructions for uploading a

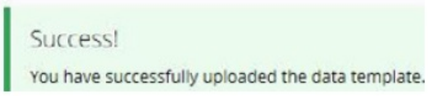
file again. Any new file you upload will replace the previous file.



- **b**. You can view all the files you submit by navigating to the History tab within the Workforce Tracker-Manage Census Data section of the eFile Direct page.



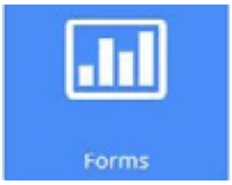
- **c**. If the system doesn't identify any errors with the upload, a green message at the top of the eFile Direct page will appear indicating that the upload was successful.



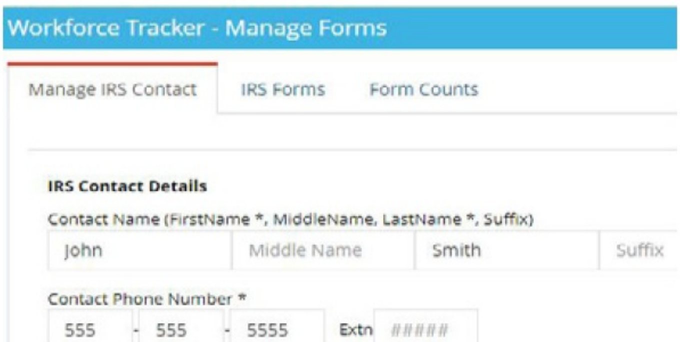
6. Once you successfully submit an upload without errors, you should gain access to a blue Forms button and a red eFile button within the Workforce Tracker field on the eFile Direct page.

Reviewing Your Submission

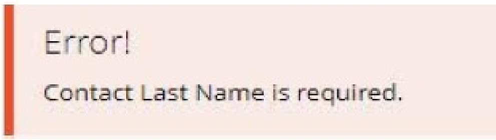
1. Click the blue Forms button in the Workforce. Tracker section of the eFile Direct page.



2. Review the Manage IRS Contact tab within the Workforce Tracker- Manage Forms section. The required fields should auto-populate from fields 7 and 8 on the Form_1094 tab of your template upload. If the fields on this tab don't auto-populate, please complete them with the information in your template.

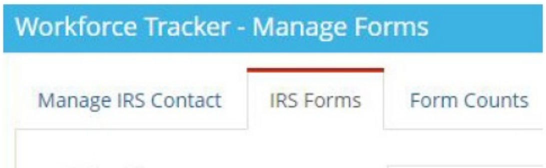


3. If you need to add or update the IRS Contact information, click the green Save button at the bottom left of the page after you have completed the required fields.
   - **a**. If there is an error with the information you submitted on the Manage IRS Contact tab, a red error message will appear at the top of the eFile Direct page indicating what needs to be fixed.



- **b**. If the system doesn't identify any errors with the information you entered, a green success message will appear at the top of the eFile Direct page.

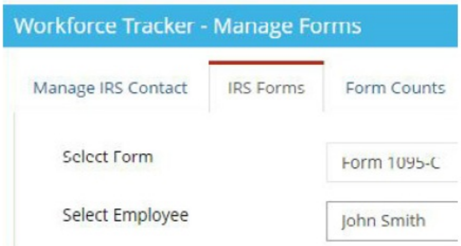
4. Once you successfully complete the Manage IRS Contact tab, navigate to the IRS Forms tab within the same section.



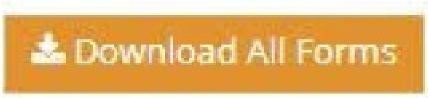
5. In the Select Form dropdown, select the Form 1094.
6. Click the purple Download Form button.
7. Review the 1094 for accuracy.
    - **a**. If you need to make any revisions to the form, click the green Edit Form button, navigate to the applicable part of the form, update the necessary fields, and then click the green Save Changes button. You can then download a new copy of the form that should reflect the changes you made. Alternatively, you can submit a new upload to replace your current upload; a new 1094 will then be generated reflecting the details in the replacement file.

Reviewing Your Submission

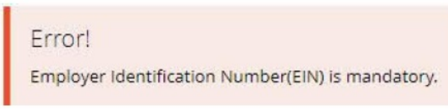
8. Navigate back to the IRS Forms tab on the eFile Direct page and select Form 1095 from the Select Form dropdown.
    - **a**. If you'd like to look at a specific employee's 1095, you can choose that employee from the Select Employee dropdown and then click the purple Download Form button.



    - **b**. If you'd like to look at all the 1095s, you can instead click the orange Download All Forms button. A pop-up window will appear with prompts for you to complete, and you should receive an emailed link to access the forms within 24 hours of submitting the request.



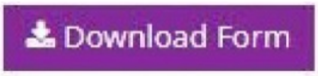
9. If you need to edit a form for a specific employee, select that individual from the Select Employee dropdown, click the green Edit Form button, make your revisions, and then click the Save Changes button.
    - **a**. If you make revisions that cause an error (e.g., accidentally deleting the company's EIN), a red error message will appear at the top of the eFile Direct page letting you know what you need to fix.



    - **b**. If the system doesn't identify any errors with your changes, a green success message will appear at the top of the eFile Direct page.

- **c**. If you want to download a new file of 1095s that reflects all the changes you've made, click the blue Download Changed Forms button and complete the prompts in the pop-up window that appears. You should receive an emailed link to access the forms within 24 hours of submitting the request.

- You can review the individual forms that have been changed by choosing the relevant individual from the Select Employee dropdown and then clicking the purple Download Form button.



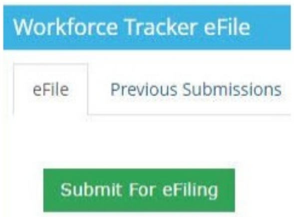
10. If you need to make systemic changes to the forms (e.g., change the employer address), you can instead navigate back to your upload by clicking the purple Data button and then submit a replacement file. If you do so, click the blue Forms button once you've successfully uploaded a new file to begin reviewing the forms generated from your replacement submission.
11. If you need to add a 1095 for an employee, you can do so either by uploading a new file that includes that individual or by clicking the green Add Form button and entering the information in the required fields.

12. If you need to delete a form for an employee, please remove them from your template and then upload the revised file.

Submitting Your Forms for e-Filing

1. Once you've verified that your submission is complete and accurate, click the red eFile button on the eFile Direct page.

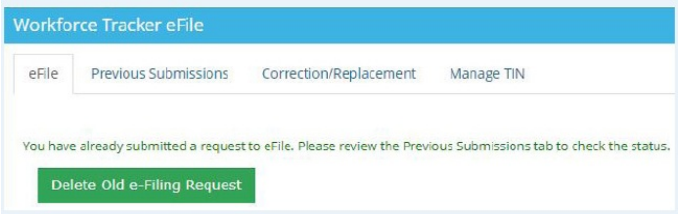
2. Within the Workforce Tracker eFile section, click the green Submit for eFiling button.



3. A pop-up window will appear indicating that your request to eFile has been submitted.

To Delete an e-File Request

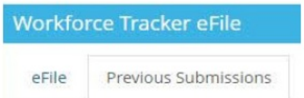
1. If you need to delete an e-File request before the data has been e-Filed, click to the red eFile button on the eFile Direct page, navigate to the eFile tab in the Workforce Tracker eFile section, and click the green Delete Old e-Filing Request button.



2. If this button isn't available to you, your submission has already been e-Fi led and cannot be deleted.

Interpreting Your IRS Results

1. E-Filing results are typically available the day after you submit your forms for e-Filing, though in some cases the IRS may take more time to provide feedback. Because of this, we recommend waiting at least one business day after you submit your forms for e-Filing to begin checking the status.
2. To check the status of your submission, navigate to the eFile Direct page.
3. Click the red eFile button within the Workforce Tracker section.
4. Navigate to the Previous Submissions tab within the Workforce Tracker eFile section.



5. Review the Status column within the table that appears:

- **a**. An Accepted status means that the IRS has accepted your filing. Your 2023 e-Filing process is complete, and no additional action is needed. Please record the IRS receipt ID reflected in the ReceiptId column for your records.
- **b**. An Accepted with Errors status means that, though the IRS identified errors in your submission, they have accepted the filing. Your 2023 e-Filing is complete. We recommend researching the errors the IRS identified, which are likely employee name/SSN mismatches between your filing and the IRS's records, to see if you should update any records in your system before next year's filing. You can download the error file by clicking the blue cloud in the Error File column.

- **c**. A Rejected status means that the IRS has rejected the filing due to an error in the submission. If your filing has been rejected, please reach out to **mzquickfile@mzqconsulting.com** for assistance.

For questions or more information, please email us at **mzquickfile@mzqconsulting.com**.

ABOUT MZQ COMPLIANCE SERVICES
MZQ, a concierge compliance firm that excels at making the complex simple, has been at the forefront of ERISA compliance services since the passage of the Affordable Care Act in 2010. Today, the company offers complete services, including ACA compliance, ACA tracking, Employer Mandate Penalty Resolution, Form 5500 Preparation, Non- Discrimination Testing, and Mental Health Parity Analysis. Our industry-leading MZQ Compass Plan creates a one-stop shop for compliance, effortlessly guiding employers from confusion to peace of mind.

Documents / Resources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E-Filing Portal Registration

MZQuickFile AN ACA E-Filing Solution Software [pdf] Instructions
AN ACA E-Filing Solution Software, E-Filing Solution Software, Solution Software, Software

References

- Compliance services that benefit you — MZQ Consulting
- User Manual