

# CASELLE<sup>®</sup> Connect Knowledge Base

## Payroll

### ACA Questionnaire

Complete this checklist before you start working on the ACA Checklist. The questions will help you identify changes to the ACA information.

1. **Did you change insurance plans during the year? If so, when is the enrollment period for the new plan?**

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2. **When are new employees eligible for health insurance coverage? (Every 30 days, 90 days, etc.)**

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3. **Will you be filing electronically or do you have more than 250 employees?**

- **Yes, I am filing electronically or I have 250 or more employees.** Have you completed your registration with the Affordable Care Act Information Returns (AIR) program to obtain your Transmitter Controller Code (TCC)? [  ] For more information about registration, check the IRS help section ([www.irs.gov/e-services](http://www.irs.gov/e-services)).
- **No, I am not filing electronically and I have less than 250 employees.** Have you purchased your tax forms? [  ]

4. **What is your Offer of Coverage code applicable to your organization?**

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5. **How much does an employee pay for self-only coverage?**

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6. **Are you filing for a Safe Harbor Exception? [  ] Refer to Instructions for Forms 1094-C and 1095-C (<https://www.irs.gov/pub/irs-pdf/i109495c.pdf>).**

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7. Do you have any individuals who have health insurance through your organization that are not included in the payroll system?

- Yes, I have individuals who have health insurance through my organization that are not included in the payroll system. Provide their name, address, Social Security number, and the months when they were covered by health insurance.
- No, this does not apply to my organization. Skip to the next question.

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8. Do you have any exceptions that prevent you from filing a replacement form for your employees? For more information, visit Publication 5223 (<https://www.irs.gov/pub/irs-pdf/p5223.pdf>) and refer to Part 1.

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9. Do you have any employees who were offered health insurance but waived it? If so, make a list of the employee names and numbers for the employees who waived health insurance.

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10. Do any Certifications of Eligibility apply to your organization? Refer to the instructions for Line 22 for Instructions for Forms 1094-C and 1095-C (<https://www.irs.gov/pub/irs-pdf/i109495c.pdf>).

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11. Do your employees use Connect Online to track and submit their hours for payroll?

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