CheckMark 1095

**User's Manual** 



1095

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Chapter 1 Getting Started	1
System Requirements	1
Software and Patch Updates	1
How to Get More Help	2
Before Contacting Support/Other resources	2
Chapter 2 Installation and Basic Use	2 2 3 5
Opening CheckMark 1095: New User	5
Opening CheckMark 1095: Upgrading Old Files	6
Database Manager	7
Update Employer	13
New Employer	13
Delete Employer	13
Exiting CheckMark 1095	13
Chapter 3 Creating a New Employer	14
Creating a New Employer	14
Updating an Existing Employer	15
Deleting an Employer	16
Filtering Employers	16
Sorting Employers	17
Chapter 4 Set Up	18
Setting up Users and Passwords	18
Setting Screen Font Size	22
Adjusting Screen Size	23
Chapter 5 Setting Up Employees	24
Creating New Employee	24
Updating an Existing Employee	26
Deleting an Employee	27
Filtering Employees	29
Sort Employees	30
Status	31
Selecting Multiple Employees	33
Chapter 6 Exporting and Importing	36
Exporting Company Information From CheckMark Payroll	36
Exporting Company Information from MultiLedger	37
Exporting Employees from CheckMark Payroll	37
Importing Employer Information from CheckMark Payroll or MultiLedger	38
Importing Employees from CheckMark Payroll and MultiLedger.	40
Importing using a tab-delimited text file.	42
Text File Format for Importing	45
Chapter 7 Printing 1094 and 1095 Forms	46
Print 1094 and 1095 Forms for Each Employer	46

Printing 1095s for Employees	48
Chapter 8 eFile	49
Creating a file to eFile	49
Corrected/Replacement Transmission	53
Chapter 9 Backup and Restore	55
Backing Up Using the Backup Database Command	55
Restoring Database using Restore Database Command	57

1

# 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, or Macintosh OS X 10.6 or higher including High Sierra.

Along with a compatible printer, the latest version of **Adobe Reader** is also required to properly print the forms from the program. You can download a free copy of Adobe Reader from Adobe's website at www.Adobe.com.

Whichever operating system you choose, a working knowledge of the operating system is essential. For more information about the basics and navigation of your operating system, see the user manual that came with your computer.

#### Software and Patch Updates

Each year the program is issued with the latest 1095 Forms as well as added features. Program patches are released as needed throughout the year for the current version of the software. Patches are available online at www.checkmark.com. Hard Copy CDs can be purchased by calling the sales department at 800-444-9922.

Renewal notices are sent out each year, in the fall, announcing the next update. Updates must be purchased each year to receive support and the ability to install patches for changes.

### How to Get More Help

This manual covers general set up and reporting. There may be items that are specific to your employer that are not addressed here except in general terms. For these times, CheckMark, Inc. offers additional support.

Only registered users can receive technical support so please, take a moment and read the License Agreement, fill out the Registration Card and send it in.

Support is offered via internet submission, E-mail, fax or telephone. Whenever you contact support, have your customer number available. It is important that you are at your computer with CheckMark 1095 running when speaking with support to best resolve your question/problem.

#### **Before Contacting Support/Other resources**

#### **Check for latest version**

Users with internet access can make sure that they are up-to-date as often as they wish by selecting **Check for Updates** under the **Help** menu in the program. If necessary, download and install the latest update (may require purchase if not using the current year's version).

#### 1095 Manual

Users can access the 1095 program manual from the Help menu while in the CheckMark 1095 program. An updated manual is included with each update.

#### **Online Knowledge Base**

Users with internet access can reference the online Knowledge Base for answers to common questions. You can access the Knowledge Base directly from the CheckMark website at www.checkmark.com.

#### Contacting CheckMark

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

Online at: http://www.checkmark.com Click on support and select Request Support

By Phone: 970-225-0387

Mail: CheckMark, Inc. 323 West Drake Road, Suite 100 Fort Collins, CO 80526

# Chapter 2 Installation and Basic Use

## Installing CheckMark 1095

#### **Macintosh Installation**

1. Close all programs and disable any anti-virus software.

#### \*\*For CD Installation\*\*

- 2. Insert the CheckMark 1095 CD-ROM into your computer's drive.
- 3. When the CD icon appears on the Desktop, open by double-clicking it, then double-click the CheckMark 1095 installer.
- 4. Follow the on-screen instructions to complete installation.

#### \*\*For Download Installation\*\*

- 5. Click on the link provided to download. After the download is complete, doubleclick the download file.
- 6. Follow the on-screen instructions to complete installation.

It is recommended to install the program on the local hard drive.

The default install location on the hard drive for CheckMark 1095 is: **Macintosh HD\Applications\CheckMark\1095\(year).** The (year) represents the current calendar year.

#### Windows Install

1. Close all programs and disable any anti-virus

software. **\*\*For CD Install\*\*** 

- 2. Insert the CheckMark 1095 CD-ROM into your computer's drive.
- 3. The Installer will start automatically.

If the installer does not start automatically after a minute, click your **Start** menu and then select **Run**.

Type in the path and filename in the **Run** box. That would be the drive name, colon (:), backslash (\), Filename. For example: **D:\setup**. Then click **Ok**.

4. Follow the on-screen instructions to complete

installation. **\*\*For Download Install\*\*** 

- 5. Click on the link provided to start the download. After the download is com-plete, Choose **Run** or **Open**.
- 6. Follow the on-screen instructions to complete installation.

It is recommended to install the program on the local hard drive.

The default install location on the hard drive is C:\ProgramFiles\CheckMark\1095\(year). The (year) represents the current calendar year.

### **Opening CheckMark 1095: New User**

- 1. Open the CheckMark 1095 application. You can use either the shortcut or alias that was created or go to the CheckMark 1095 folder that was installed and dou-ble-click the CheckMark 1095 application file.
- 2. The first time you open the program the welcome screen appears.

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

Welcome	no Mark 1095 for 2017
	CheckMark 1095 for 2017!
	kMark 1095 right away by setting up your own company and processing real u to process any number of 1095s for your company.
	etting started, or trouble navigating some of CheckMark 1095's more advanced k out the 'Help' menu for helpful links and downloads such as the Quick Start
Help' menu will help you	to explore 1095's wide range of features.
	t us with any questions, concerns, or feedback on your experience or send us an ls' link on the checkmark.com home page.
We hope you enjoy your o software and services fro	experience with CheckMark 1095, and don't forget to check out the other great m CheckMark, Inc.
Print Message Copy Me	ssage
	Continue
	Continue

**Important:** It is recommended that you set up a password to protect your private information. For information on setting up passwords, See "Setting up Users and Passwords" on page 19.

## **Opening CheckMark 1095: Upgrading Old Files**

The information will be stored in a database that is created the first time you open your previous files. the default location is:

Macintosh: HD\CheckMark\1095\(year) Windows: C:\CheckMark\1095\(year)

- 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 doubleclick the CheckMark 1095 application file.
- 2. If you have a previous 1095 database from a prior year, the program will ask you if you want to import the Employer and Employee information.
- 3. Click **Yes** to continue. Enter the Username and Password from the prior year, if requested.

	CheckM 1 <b>095</b> So	ftware
Name	Kris	
Password	••••	

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

#### **Database Manager**

CheckMark 1095 stores employer data in a database. When initially opening CheckMark 1095, a database named CheckMark\_1095\_ Database\_[year] is created.

If you complete 1095 forms for only one employer, this is probably the only database you will need.

However, if you process forms for more than one employer, you will need to choose one of the following options to manage your companies correctly. You can either store all of your employer files in the same database, or you can create separate databases and store individual companies in them.

#### Storing Multiple Employer Files in the Same Database

Each database can contain multiple companies. The advantage of storing all of your different employer files in one database is that when you Backup Database, Restore DataBase, Close Database, or advance to a new year, all companies stored in that database will be backed up, restored, closed or advanced to a new year at the same time, saving you time.

## Storing Employer Files in Separate Databases

The advantage of storing each of your employer files in separate databases is that you have more control over where your database is stored on your computer, as well as when you want to **Backup Database**, **Restore Database**, **Close Database**, or advance companies to a **New Year**.

# Using the Database Manager

Choose Database Manager from the File menu.

000		Database Manager	
1095 Year	Database Name		Help
2019 2019	CheckMark 1095 D CheckMark 1095 D		
* 2019	Test Scenario		
2019	Test Scenario		
Path /User		ts/CheckMark/1095/2019/Test Scen	ario 2019.db
currently o	pen		
Cre	ate New Database	Add Database to List	Find Databases
Re	ename Database	Move Database	Remove from List
	Oper	Database Close Database Mai	nager

## **Create New Database**

This option allows you to create and save a new database in any location you wish. Keep in mind that each database can store multiple companies.

- 1. Click Create New Database.
- 2. Enter a **Database Name** and **Payroll Year.** Click the **Browse** button to select a new location to save the database.

000	Create Database
Database Name	CheckMark 1095 Database 2 (Don't include year in name)
1095 Year	2019
Directory	/Users/MMPGraphics/Documents/CheckMark/1095/2019/ Choose Directory
Path	/Users/MMPGraphics/Documents/CheckMark/1095/2019/CheckMark 1095 Database 2 2019.db
	Cancel Create Database

3. Click **Create Database** to save the new database.

#### Add Database to List

This button allows you to add an already-existing database to the list. For example, if you copied a database from another computer and the **Database Manager** does not list this database, you can choose **Add Database to List** and browse to that location to update the **Database Manager's** list.

#### 1. Click Add Database.

An Open dialog box appears

000		D	atabase Manager			
1095 Year	Database Name					Help
2019 2019	CheckMark 1095 CheckMark 1095		4			
* 2019	Test Scenario					
2019	Test Scenario					
Path /Users	s/MMPGraphics/Docume	ents/Check	Mark/1095/2019/Test	Scena	rio 2019.db	
* currently of						
Crea	ate New Database		Add Database to List		Find Databas	ses
Re	name Database		Move Database		Remove from	List
	Ор	en Database	Close Databa	ase Mana	ager	

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

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

## **Rename Database**

This option allows you to rename the database. It is recommended that you use only alphanumeric characters.

#### 1. Click **Rename Database.** The

following alert appears:

2	If you are the only one who accesses this database, you may safely continue renaming or moving the database now and ignore the following insructions.	^
Print Copy	Other users accessing this database from different computers will need to re-locate this database after renaming or moving. If the database is being accessed by multiple users, please follow these instructions to succussfully modify this database file and re-locate it on other computers: <ul> <li>(1) Exit CheckMark 1095 all other computers that access this database.</li> <li>(2) Continue modifying the database file from this computer.</li> <li>(3) For each computer that accesses this database, complete the following steps:</li> <li>(4) Launch CheckMark 1095 and open the Database Manager from the 'File' menu.</li> <li>(5) Select the following database from the Database List:</li></ul>	

- 2. Click Yes. Otherwise, if you don't want to rename at this time, click no
- 3. Enter the new name and click **Rename Database** to save.

The Rename Database window appears:

lew Name	New Name Da	atabase		
			ОК	Cancel
			ОК	Cancel

#### **Remove From List**

This option allows you to remove a database from the list.

- **Note:** This only removes the listing in the **Database Manager**. It does not delete the database file from the saved location. To delete a database, you will need to manually delete the database (.db) file from your hard drive or saved location.
  - 1. Click **Remove From List.**

A Warning message appears

Rem	ve database from li	st?	
Are yo	sure you want to remove th	ne selected database from the list?	

2. Click **Yes** to remove the database from the Database Manager list.

You can add the database again at anytime by using the Add Database command as long as you don't delete the database from the computer.

#### **Open Database**

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

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

The new database is now open and all companies stored in this database are now available.

#### **Close Database Manager**

This option closes the Database Manager window.

### **Update Employer**

This commands allows you to update the currently selected employer's information. Once the program is launched, open the database that contains the employer you want to update. Highlight the employer Employer and click the **Update Employer** command. Enter the information you want to change, then click **Update Employer** to save the changes.

#### **New Employer**

This Command allows you to add a new employer to the database that is currently open. Once the program is launched open the database you wish save the employer in. Click **New Employer** then enter the information for this employer. Click **Add Employer** to save the employer to the database.

#### **Delete Employer**

This command allows you to delete an employer from a currently opened database. Once the program is launched open the database that contains the employer you want to remove. Click **Delete Employer** and a screen will appear to make sure you want to delete the employer. Click **Confirm Delete** to complete the deletion process.

#### **Exiting CheckMark 1095**

To exit or quit CheckMark 1095:

- Choose **Exit** from the **File** menu (Windows)
- Choose Quit from the CheckMark 1095 menu (Mac)

# **Chapter 3 Creating a New Employer**

This chapter shows you how to create a new employer file and enter basic employer information.

## **Creating a New Employer**

- On Windows, double click the 1095 shortcut on the desktop or click the Start menu, select Programs, then select CheckMark 1095 from the CheckMark Inc. File.
   On Macintosh, double click on the CheckMark 1095 alias on the dock or on your Desktop, or double click the CheckMark 1095 icon located in the install folder that was installed on your hard drive
- 2. Click the New Employer button in the middle of the screen.

	CheckMark 1095 E-File 2019
	CheckMark <sup>®</sup> 1095 Software
Employers	1094-B C Filter
New Emp	ployer
Employees	Update Employer New Employer Delete Employer Open Database Filter All Status
	Update Employee New Employee Delete Employee
	Test Scenario - 1095 Year 2019 /Users/MMPGraphics/Documents/CheckMark/1095/2019/Test Scenario 2019.db

**Note:** If the **New Employer** button is greyed out that means you need to first open a database or create a database. For **Creating a Database** please see page 9

3. Enter **Employer Information** for all required fields.

 General Employ	er Details	
<b>Check</b> 1095 S	Mark <sup>™</sup> Software	
		OMB No. 1545-2252 2019 Form 1094-B
1.Employer's Name	1	
2.Employer identification number(EIN)		
3a.First Name of person to contact		
3b.Last Name of person to contact		
4.Contact telephone number		
5.Street address (including room or suite no.)		
6.City or town		
7.State or province		
8a.Country		
8b.ZIP or foreign postal code		
Issuer or Other Coverage Provider		
Name		
Employer identification number (EIN)		
Contact telephone number		
Street address (including room or suite no.)		
City or town		
State or province		
Country		
ZIP or foreign postal code		
Update Employer Add Empl	oyer Cancel	

4. Click Add Employer button to Save.

## Updating an Existing Employer

- 1. Highlight the employer in the list you wish to update and click the **Update Employer** button.
- 2. After all changes have been made to the **Employer Information**, click the **Update Employer** button to save the changes

## **Deleting an Employer**

You cannot delete an employer if there are any employees created within the employer. You must delete the employees first before deleting an employer. For information on deleting employees see "Deleting an Employee" on page 27.

- 1. Select the employer you wish to delete.
- 2. Click Delete Employer
- 3. In the pop-up window, click the **Confirm Delete** button.

	<u>/lark</u>	
109	e di territa de collion	nploye

If no employees are associated with this employer, the employer will be deleted.

#### **Filtering Employers**

You can use the **Filter** button to search for certain employers in the list. To find a particular employer, enter all or part of the name of the employer into the Filter box area at the top of the screen and click the **Filter** button. The Filter will search for any employers that contain those variables.

You can also use an asterisk (\*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N\*), you will receive all employers that <u>begin</u> with the letter "N".

## **Sorting Employers**

You can sort employers by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Employers Ascending** or **Sort Employers Descending**.

CheckMark 1095 E-File	File Edit View Tools Sort Window Help
	CheckMark 1095 E-File 201  ✓ Sort Employer Ascending Sort Employer Descending CheckMark  ✓ Sort Employees Ascending 1095 Softw
Employers	1094-B S Filter
New Employer	
Update E	New Employer Delete Employer
Employees Filter	All Status
Update En	ployee New Employee Delete Employee
Database: Test Scenario - 10	5 Year 2019

# 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 menu bar and select **Admin** 

		dit View Mark 1095 E	Tools Adm	Sort	Window	Help
			Back	cup Data nload Cl	oud Backu	qu
	1094	-В 🗘		Filte	er 🗌	
Update Emp	loyer	New Emplo	yer (	Delete E	Employer	)
	(	Open Datab	ase			
Filter					All S	Status
	Update Empl	Update Employer	Update Employer New Emplo	Update Employer New Employer ( Open Database	Update Employer New Employer Delete E	1094-B     Filter       Update Employer     New Employer     Delete Employer       Open Database     Open Database

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

• • •	CheckMark 1095 Admin	
	CheckMark <sup>®</sup> 1095 Software	
Users		
Add User	Update User Delete User	Close

3. Enter the Name and Password.

Note: The Name and Password are case sensitive.

4. Click the checkbox for **This user should be granted ADMIN privileges** if you want this user to be able to add, update or delete other users.

**IMPORTANT:** The first user set up will have **Admin** privileges. You cannot delete or change this user's **ADMIN** privileges until another user with Admin privileges is created.

Users with **ADMIN** privileges can add/delete/update other users, Backup and Restore the database and Check for updates.

2	n
4	υ

	User Details ×
	CheckMark <sup>®</sup> 1095 Software
User Inform	
User Name	Admin
Password	
Re-enter Pa	assword
This user sh	nould be granted ADMIN privileges 🗹
	Add User Update User Cancel

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

## **Updating Users**

- 1. Click on the **Tools** menu in the menu bar and select **Admin.**
- 2. Highlight the user you want to update from the list.
- 3. Click the **Update User** button.
- 4. Make the necessary changes and click the **Update User** button to save.

## **Deleting Users**

- 1. Click on the **Tools** menu in the menu bar and select **Admin.**
- 2. Highlight the user you want to delete from the list.
- 3. Click the **Delete User** button.
- 4. In the popup window, verify that the correct user name is selected and click the **Confirm Delete** button.

	<b>Check</b> Ma		
	1095 Soft	THE SECOND STOCKED	
ease ve	rify that you want to delete the	e following emplo	yer
		e following emplo	yer
lease ve New Emp		e following emplo	yer

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

## **Setting Screen Font Size**

This setting allows you to customize how big or small you want the font on the screen in the program. You can increase or decrease the font size as needed.

#### **Selecting Font Size**

- 1. Click on the **View** menu in the menu bar.
- 2. Choose Increase Font Size to make the font larger, choose Decrease Font Size to make the font smaller.

CheckMark 1095 E-File	File Edit Vie	w Tools Sort	Window Help	
		ncrease Font Size	<b>#</b> =	
		Decrease Font Size	<b>H</b> -	
	Chec	kMark <sup>™</sup>		
	1095	Software		
Employers	1094-В 🗘	Filt	er	
New Employer				
Update Emp	loyer New Er	mployer Delete	Employer	
	Open D	atabase		
Employees Filter			All Status	\$
Update Empl	oyee New Er	nployee Delete	Employee	

# **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.

	Chec	<b>k</b> Mark <sup>®</sup>		
Users	)1095	Softwa	re	
Users Admin				
			12 - X2	
	Update User	Delete User	Close	

# **Chapter 5 Setting Up Employees**

This chapter explains how to setup new Employees for each employer.

#### **Creating New Employee**

- 1. Open the Database that contains the employer to which you want to add employees. If no Database exists you must first create one. See "Create New Database" on page 9.
- 2. Select an Employer from the list. If no Employers are listed, you must first set up an employer before adding employees. For information on setting up a new employer, see "Creating a New Employer" on page 14.
- 3. Click the **New Employee** button.

		<b>Check</b> <b>1095</b> S	Mark <sup>™</sup> oftware		
Employers		1094-В 🗘	Filte	r	
New Employe	r				
	Update Em			mployer	
Employees	Filter	Open Datab	ase	All Status	0
			Poloto F	mployee	
	Update Emp	oloyee   [ New Emplo	yee   Delete b		

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.

	0MB No. 1545-2252 2019 orm 1095-B
General Information Covered In	ndividuals
esponsible individual	Information about Certain Employer-Sponsored Coverage
1a. First Name of responsible individual	Copy Employer Information
1b. Middle Name of responsible individual	10. Employer Name
1b. Last Name of responsible individual	11. Employer identification number (EIN)
2. Social security number	12. Street address (including room or suite no.)
(SSN or other TIN) 3. Date of birth	13. City or town
(If SSN or other TIN is not available)	14. State or province
4. Street address (including apartment no.)	15a. Country
5. City or town	15b. ZIP or foreign postal code
6. State or province	Issuer or Other Coverage Provider
7a. Country	16. Name
7b. ZIP or foreign postal code	17. Employer identification number (EIN)
Enter letter identifying Origin of the Health Coverage.	18. Contact telephone number
9. Small Business Health Options Program (SHOP)	19. Street address (including room or suite no.)
Marketplace Identifier, if applicable	20. City or town
	21. State or province
	22a. Country
	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.

	CheckMark	
	<b>1095</b> Software	
	The following errors were discovered: e of form XXX-XX-XXXXX	
Any of the 12 months of	or All months 'Emp Share' must have value greater than 0.00 if Any of the Offer Coverage is either '1B', '1C', '	IE.

Press **cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the employee information

**NOTE:** If any field has an invalid entry, once you return to the Employee set up screen, that field name will show up in "**Red**". In addition, some fields will not save the invalid information and remain empty. For more information on validated information, see "Validated Status" on page 32.

#### Updating an Existing Employee

- 1. Select the employer that contains the employee(s) you wish to update.
- 2. Highlight the employee in the list you wish to update and click **Update Employee** button.
- 3. After all changes have been made to the **Employee Information**, click **Update Employee** button to save changes.

## Voided Employee

If a 1095 is incorrectly filed, or included in a filing, that was incorrectly filed, you can resubmit the 1095 as a Voided copy to void the original 1095 to the IRS. Please read the IRS Instructions on how to file this.

- 1. Select the employee from the list and click Update Employee button
- 2. Click the **Void** check box at the top of the screen.

If the employee's Status is already considered **Printed** and/or **Completed**, you'll receive a pop up window asking if you would like to change the status back to Not Printed and/or Not Completed. For information on what the different Statuses mean, see "Status" on page 31.

3. Mark the corresponding checkbox next to "NOT Printed' and/or "NOT Complete" if you want to change the status and click the Save and Continue button. If you do not want to change the status, click the Cancel button. If you do not select either checkbox, you can still click the Save and Continue button to save any updated employee information without changing their status.

If you initially printed the form, reprint another 1095 with the updated **Void** status and submit that form to the IRS with a new 1094 form. for instructions on printing 1095 forms, see "Printing 1095s for Employees" on page 48.

If you initially e-filed, create a new .txt file with that employee and updated **Void** information and submit it to the IRS. For information on e-Filing, see "Creating a file to eFile" on page 54.

## **Corrected Employee**

If a 1095 is filed, or included in a filing, with incorrect information, a **Corrected** 1095 must be filed with the IRS.

- 1. Select the employee from the list and click the **Update Employee** button.
- 2. Click the **Corrected** check box at the top of the screen, update any information and click the **Update Employee** button to Save.

If the employee's Status is already considered **Printed** and/or **Completed**, you'll receive a pop up window asking if you would like to change the status back to **Not Printed** and/or **Not Completed**. For information on what the different Statuses mean, see "Status" on page 31.

3. Mark the corresponding checkbox next to "**NOT Printed**' and/or "**NOT Complete**" if you want to change the status and click the **Save and Continue** button. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated employee information without changing their status.

If you initially printed the form, reprint another 1095 with the updated **Corrected** status and submit that form to the IRS with a new 1094. for instructions on printing 1095 forms, see "Printing 1095s for Employees" on page 48.

If you initially e-Filed, create a new .txt file with that employee and updated Corrected information and submit it to the IRS. For information on eFiling, see "Creating a file to eFile" on page 54.

#### **Deleting an Employee**

- 1. Select the employer that contains the employee(s) you wish to delete
- 2. Highlight the employee in the list you wish to Delete.

If you want to delete more than one employee, you can highlight multiple employees at once. See "Selecting Multiple Employees" on page 33.

- 3. Click **Delete Employee** button.
- 4. A pop-up window appears to confirm that these are the employees you want to delete.
- 5. Click **Confirm Delete** to complete the process.

0		<b>A</b> 1 W	
	<b>Check</b> 1095 Sc		
			emplovees
Bob Dylan	y that you want to de	lete the following o	inployees
Bob Dylan	y that you want to de	lete the following o	employees
Bob Dylan A Enya	y that you want to be		impioyees
Bob Dylan	Confirm Delete	Cancel	

## **Filtering Employees**

You can use the **Filter** button to search for certain employees in the list. To find a particular employee, enter all or part of the name into the **Filter** box area above the employees section and click the **Filter** button. The Filter will search for any employees that contain those variables.

You can also use an asterisk(\*) to help sort groups. For instance, if you enter the first letter and then an asterisk, ex: N\*, you will receive all employees that <u>start</u> with the letter "N".

## Sort Employees

You can sort employees by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Employees Ascending** or **Sort Employees Descending**.

CheckMar	k 1095 E-File	File	Edit	View	Tools	Sort	Wind	low	Help
		Che	ckMark	c 1095 E	-File 20'				Ascending Descending
					Mark oftw	✓ Sort	Emplo	oyees	s Ascending s Descending
Employers		109	94-B	(\$		Filte	er		
New Employe	r							-	
	Update Emp	oloyer	Ne	w Emplo	oyer	Delete I	Employ	ver	
			Ope	en Datab	ase				
Employees	Filter						(	All S	tatus 🗘
	Update Emp	loyee	Ne	w Emplo	yee	Delete	Employ	/ee	
	Scenario - 1095								
Path: /Use	ers/MMPGraphics	/Docun	nents/C	CheckMa	ark/1095	/2019/T	est Sce	enario	o 2019.db

### 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.* 

	CheckMark 1095 E-F	ile 2019	
	<b>Check</b> <b>1095</b> Sot		
Employers	1094-В 🗘	Filter	
New Employer			
l	Jpdate Employer New Employe	Delete Employer	
	Open Databas	e	
Employees Filt	er )		Status
Jagger, Mick			
Richards, Keith			
Richards, Keith	ipdate Employee ) ( New Employe	e Delete Employee	)

#### **Printed Status**

You can easily sort using this status to see which employees still need the form 1095 printed.

You can select either **Printed** or **Not Printed** status to sort for employees by whether or not you have printed a 1095 for them. Once you select the **Print Forms for Employee** command from the **File** menu, that employee will automatically be moved to the **Printed** status from the **NOT Printed** status.

#### **Completed Status**

You can use the **Completed** status to indicate which employees have or have not been printed or e-Filed this form 1095 for employer related copies.

Once you select the **Print forms for Filing** option under the **File** menu, employees listed under **NOT Completed** will be moved to the **Completed** status.

#### Validated Status

Sorting by **Validated or NOT Validated** helps you easily determine if there is any employee that is not set up correctly. In the employee screen, certain fields require specific characters, numbers, etc. to be accepted upon filing.

Select **Validated** to see which employees are ready to be filed. Select **NOT Validated** to see any employees that have set up criteria which is incorrect for filing purposes. Once you have sorted by **NOT Validated**, select an employee and click on the **Update Employee** button to view the set up and make necessary changes. Fields marked in "**RED**" do not meet the requirements for filing and corrections should be made.

#### Voided Status

In the Employee set up screen, there is a checkbox at the top of the screen for **Void**. If you filed a 1095 for an employee that was unintended, you can mark **Void** to resent the 1095 for that employee as a void status.

Choosing a **Voided** status will list all employees marked **Void** in the Employee set up screen. All other employees that are not marked **Void** in the employee set up screen are listed as **NOT Voided** for a status.

#### **Corrected Status**

In the Employee set up screen, there is a checkbox at the top of the screen for **Corrected**. If you filed an incorrect 1095 and need to resubmit a new 1095 with updated information, select the **Corrected** checkbox in the employees set up screen before submitting the new 1095 information.

The **Corrected** status indicates all employees who are marked as **Corrected** in the employee set up screen. All other employees will be listed as **Not Corrected**.

# **Selecting Multiple Employees**

#### **Consecutive Selection**

**Windows:** You can select multiple employees by clicking the first employee while holding down the mouse and moving the mouse down through the list

You can also click the first employee, hold down the 'SHIFT' key on the keyboard and then click on the last employee you want in the list.

**Macintosh:** Click on the first employee you want in the list, hold down the 'SHIFT' key on the keyboard and then click on the last employee you want in the list

	CheckMark 1095 E-File	e 2019
	CheckMa 1095 Sof	ark≊ tware
Employers	1094-В 🗘	Filter
New Employer		
	Update Employer New Employer	Delete Employer
Employees	Open Database	All Status
Dylan, Bob		
Jagger, Mick Richards, Keith		
	Update Employee New Employee Scenario - 1095 Year 2019 s/MMPGraphics/Documents/CheckMark/1	Delete Employee

#### **Non-Consecutive Selection**

**Windows:** To select specific employees as a group, click on the first employee you want, hold down the 'CTRL' key on the keyboard and click on any other employees you want to include.

**Macintosh:** To select specific employees as a group, click on the first employee you want, hold down the 'COMMAND' key on the keyboard (also known as the Apple key) and click any other employees you want to include.

	CheckMark 1095 E-File 2	2019
	CheckMa 1095 Softw	rk <sup>™</sup> ∧vare
Employers	1094-В 🗘	Filter
New Employer		
	Update Employer New Employer	Delete Employer
Employees	Open Database Filter	All Status
Dylan, Bob		
Jagger, Mick Richards, Keith		
Richards, Keiti		
	Update Employee New Employee	Delete Employee
	Scenario - 1095 Year 2019 s/MMPGraphics/Documents/CheckMark/10	95/2019/Test Scenario 2019 dh
/036	symmetry bootherits/offectividity fo	56/2010/1030 0001010 2013.0D

# **Chapter 6 Exporting and Importing**

This chapter explains how to export employees and companies from CheckMark Payroll as well as companies from CheckMark MultiLedger and how to import this information from CheckMark Payroll, MultiLedger or tab-delimited text file.

# **Exporting Company Information From CheckMark Payroll**

- 1. Open CheckMark Payroll, then open the employer you wish to export.
- 2. Under the File menu select Export Company.

CheckMark Payroll	File Edit	t View	Setup	Payroll	Reports	Window	Help
	Open Co Close C	mpany ompany ompany			жn жо	ler Checks/I Payroll N	
CheckMa	Databas Close D	e Manag atabase	er			Knowledge Request Su	
Setup	Restore Backup	ad Backu Database Database	ə	oud			
Company Information	Start Ne	w Year 2	019 (Imp	ort Prior '	Year)		
Federal Tax Values State Tax Values		Employee Employee					
Local Tax Values	<u> </u>	Company.					
Hour Categories Additional Income	Preferer Select P Page Se	rint Font.				Print	
Deductions Employees		4/2/20	19				0
Employer Payees Ledger Accounts		19.0.5	Payroll pat	ch for 2019	ad and install 9. This patch as updates to	has the new	
Payroll	<	tax cal ACH fi		s well as fi	xing the issue	e with the	
Distribute Hours Enter Hours		12/27/	2018				
Calculate Pay Review/Create Paych	necks	2018, p	lease do s	o. You will r	the 18.0.19 p need this pate ms and EFW2	ch to make	
Print Poychacks						-	

- 3. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.
- 4. Click Save.

# **Exporting Company Information from MultiLedger**

1. Open the MultiLedger program, under the File menu select **Export Company...** 

MultiLedge	er File Edit Setup Transactions R	eports	Window Help	
$\bigcirc \bigcirc \bigcirc$		sion 9.0.4	4	
Setu	Open Company ₩O Open Recent Company		Repo	orts
Company Information	Close Company	n ases	Account Reports	Trial Balance
Interface Accounts	Rebuild Files Rename Files	oles nal	Transaction Journals	General Ledger
Financial Statements	Renumber Accounts	dor ents	Balance Sheet	Income Statement
Customer Setup	Format	ement nal	Cash Flow	Financial Snapshot
ltem Setup	Export Import	ist tory	Customer Reports	Vendor Reports
Sales Tax Setup		ık liation	ltem Reports	Job Reports
Customer Terms	Download Backup from Cloud	ring	Sales Tax Report	Salesperson Report
Service Sample Co /Users/MMPGraphics	Number of Users: 1 ;/Desktop/Year End Docs-2020/Sample Companies/S	ervice/Serv	v-Sole.ML0	

- 2. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your desktop.
- 3. Click Save.

# **Exporting Employees from CheckMark Payroll**

- 1. Open CheckMark Payroll, go under File menu and choose Export Employees
- 2. Highlight which employees you want to export from the list.

**Note:** If the employees to be imported are using different types of 1095 forms, you should create an export file for each type of form. Example, one export file for 1095-B, and one file for 1095-C.

3. Click the **Export 1095** button. The **Selected Field** list will automatically populate with the correct available fields to import into the 1095 software.

Save		Export Employee Information	
Available Fields		Selected Fields	Employees
Last Name First Name Address Line 1 Address Line 2 City Stote 2 Zip Social Security # Email Phone Number Birth Date Employee # Department Choice Direct Deposit Checkbox Prenote Checkbox Prenote Checkbox Prenote Checkbox Prenote Checkbox Account # 1 Account # 1 Account # 1 Account # 2 Account # 2 Account # 2 Account 2 Type Choice Account 2 Type Choice Account 2 Routing # 3 Account # 3	Copy ->	Employee Nome Employee SSN Employee Street City State Zip	Arroyo, Lydia Bocz Joan Cole, Not K Dylon, Bob Enya, A Fiery, George Gotlock, CJ Hagar, Samy Harrison, George Lennon, John Lopez, Jennifer McCartney, Paul Orlando, Steve Parrot, Fred Ramos, John Randolph, Bruce Reyes, Joscar Rodney, Louis Springsteen, Bruce Vermont, Jim York, New

- 4. A **Save** dialogue box appears in the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.
- 5. Click Save.

# Importing Employer Information from CheckMark Payroll or MultiLedger

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

**Note:** If the database that you want to import employees to does not exist, you will need to create a new database before importing. For information on creating a new database see "Creating a New Database" on page 9.

- CheckMark 1095 E-File File Edit View Tools Sort Window Help Create Database ... Import Employer Import Employee Import Prior Year Open Database е Database Manager Filter Employers Close Database New Employe E File... Convert General to ALE Convert ALE to General Print Forms for Employer Update Em ete Employer Print Forms for Employee Open Database Employees Filter All Status \$ Dylan, Bob Jagger, Mick Richards, Keith Update Employee New Employee Delete Employee Database: Test Scenario - 1095 Year 2019 /Users/MMPGraphics/Documents/CheckMark/1095/2019/Test Scenario 2019.db Path:
- 3. Under the File menu select Import Employer.

4. Choose the type of employer you are importing.

CheckMark 1095 Import Type	
CheckMark <sup>®</sup> 1095 Software	
Please select the type of Employer to create	
General(1094-B) OALE(1094-C)	
OK Cancel	
	//

5. Click **OK** 

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

	CheckMar 1095 Softv	
[	Import from Payroll or MultiLed	ger
Available Fields	Add Field>	Selected Fields
Employer's Name Employer's EIN Address City	Add All Fields>	Employer's Name Employer's EIN Address City
State ZIP Phone	< Remove Field	State ZIP Phone
	< Remove All Fields	

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

### Importing Employees from CheckMark Payroll and MultiLedger.

- 1. Open the CheckMark 1095 application.
- 2. Open the Database which contains the employer you want to import into.
- 3. Select 1094-B or 1094-C depending on which type you will be importing.
- 4. Select the employer you want to import employees for.

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

5. Under the File menu select Import...

File Edit View Tools	Sort Window Help
Create Database	CheckMark 1095 E-File 2019
Import Employer Import Employee Import Prior Year Open Database Database Manager Close Database	CheckMark 1095 Software
E File	
Convert General to ALE Convert ALE to General Print Forms for Employer Print Forms for Employee	ployer New Employer Delete Employer
Employees Filter	All Status
Dylan, Bob Jagger, Mick Richards, Keith	
Jagger, Mick Richards, Keith	te Employee Delete 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.

	CheckM 1095 Sof	
Available Fields	import from Payroll or Mul	ltiLedger
Employee's Name	Add Field>	Employee's Name
Street Address City State	Add All Fields>	City State
ZIP Employee's SSN	< Remove Field	ZIP Employee's SSN
	< Remove All Field	ds
	Import	Cancel

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

## Importing using a tab-delimited text file.

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

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

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

	Create Database	
	Import Employer	
	Import Employee	
	Import Prior Year	e
	Open Database Database Manager	<b>C</b>
mployers	Close Database	Filter
New Employer	E File	
	Convert General to ALE	
	Convert ALE to General Print Forms for Employer	-
Update Err	Print Forms for Employee	ate Employer
		_
	Open Database	
mployees Filter		All Status
Filter		All Status
Dulas Dala		
Dylan, Bob		
Jagger, Mick		
Jagger, Mick	loyee New Employee 4	Delete Employee

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

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



6. The import screen allows you to select which fields are being imported. Select the fields in the same order as the text file you're importing. Click the **Import** button after you have added all fields to the **Selected Field list**.

	CheckMa 1095 Soft	ware
	Import from Payroll or MultiLe	dger
Available Fields	Add Field>	Selected Fields
Employer's Name Employer's EIN Address City	Add All Fields>	Employer's Name Employer's EIN Address City
State ZIP Phone	< Remove Field	State ZIP Phone
	< Remove All Fields	

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

# **Text File Format for Importing**

CheckMark 1095 program uses a tab-delimited .txt file for importing Companies and the Employees.

Each field is separated by a **Tab** with **Return** at the end of the record before starting the next employee. An example of a text file to be imported is shown below and contains the **Selected Fields:** *Employer Name/Last Name (required), First Name, Address 1, Address 2, City, State, Zip, Employees ID.* 

Power[tab]Max[tab]44 Main St[tab]Ste 101[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]

• If any fields are not applicable, for instance the address 2 field, a space can be used as a place holder. For example:

Power[tab]Max[tab]44 Main ST[tab]"**space**"[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]

• If no space is included, two consecutive [tabs] will also work. For example:

Power[tab]Max[tab]44 Main St[tab][tab]FortCollins[tab]CO[tab]80525[tab]123-45-6789[return]

**IMPORTANT:** Make sure the items in the **Selected Fields** list are in the same order as the items in the text file being imported to ensure that all values are imported into the correct fields

# **Chapter 7 Printing 1094 and 1095 Forms**

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

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

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

### Print 1094 and 1095 Forms for Each Employer

- 1. Select which type of 1094 form you want to print from the drop down menu: 1094-B or 1094-C.
- 2. Select the employer you wish to print 1094 and a 1095 forms.
- 3. Select which employee(s) in the list you would like to print forms for. If no employees are selected, all employees will be included.

**Note**: You can sort the employees by using the Status drop down menu to group employees by **Printed**, **Completed**, **Validated**, **Corrected**, and **Void**. For more information on using the Status drop down menu and what each Status means, see "Status" on page 31.

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

	File Edit View Tools	Sort Window Help	
•	Create Database	CheckMark 1095 E-File 20	19
L	Import Employer Import Employee		TN
L	Import Prior Year	CheckMark 1095 Softw	
L	Open Database Database Manager		
L	Close Database	1094-B	Filter
Г	E File		
Г	Convert General to ALE		
k	Convert ALE to General Print Forms for Employer		
E	Print Forms for Employee	oyer New Employer	Delete Employer
		Open Database	
	Employees		
	Employees Filter		All Status
	Dylan, Bob		All Status
			All Status
	Dylan, Bob Jagger, Mick		All Status
	Dylan, Bob Jagger, Mick		All Status 🕞
	Dylan, Bob Jagger, Mick		All Status
	Dylan, Bob Jagger, Mick		All Status 💽
	Dylan, Bob Jagger, Mick Richards, Keith		
	Dylan, Bob Jagger, Mick	mployee New Employee (	All Status C
	Vylan, Bob Jagger, Mick Richards, Keith		Delete Employee

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

# **Printing 1095s for Employees**

- 1. Select which type of 1094 form you want to print from the drop down menu: 1094-B or 1094-C.
- 2. Select the employer you wish to print 1094 and a 1095 forms.
- 3. Select which employee(s) in the list you would like to print forms for. If no employ-ees are selected, all employees will be included.

**NOTE:** You can sort the employees by Status drop down menu to group employees as **Printed, Completed, Validated, Corrected and Void**. For more information on using the Status drop down menu and what each Status means, see "Status" on page 35.

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

e File Edit View Tools	Sort Window Help CheckMark 1095 E-File 2019
Create Database Import Employer Import Prior Year Open Database Database Manager Close Database	CheckWark CheckWark 1095 Software 1094-B Filter
E File	
Convert General to ALE Convert ALE to General Print Forms for Employer Print Forms for Employee	pyer New Employer Delete Employer
Employees Filter	All Status 0
Dylan, Bob Jagger, Mick	
Richards, Keith	
Update E	Employee Delete Employee
Database: Test Scenario - 10	095 Year 2019

NOTE: If a security warning appears click allow for the form to open in Adobe Acrobat

5. This will bring up the print dialog. You can print to PDF to verify the information before printing the forms or just print the forms.

# Chapter 8 eFile

This chapter shows you how to eFile 1095 forms using the IRS ACA Information Returns (AIR) Program. If you have never eFiled 1095s in the past, You will need to visit the IRS website at www.irs.gov to sign up for an AIR system account and receive a Transmitter Control Code (TCC), You should do this 45-60 days before the filing deadline.

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

**NOTE:** The ability to eFile is only available to customers who have purchased the 1095 eFile version. If you need to upgrade from the printed version, call 1-800-444-9922 or visit the CheckMark website at www.checkmark.com.

### Creating a file to eFile

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

- 1. Select the employer you want to eFile for.
- 2. Select the employees you wish to include. You can sort using the different forms or choose **All Forms** from the drop down menu to select all employees. For information on selecting multiple employees, see "Selecting Multiple Employees" on page 33.

**NOTE** : If you do not choose any employees, the eFile option will not be available.

You can sort the employees by the Status drop down menu to group employees as **Printed, Completed, Validated, Corrected** and **Void**. For more information on using the Status drop down menu and what Status means, see "Status" on page 31.

3. From the File menu, choose eFile...



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

	CheckMark 1095 Software	
	The following errors were discovered:	
EMPLOYER WITH ERRORS: Saberton Corp		

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

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

t View Window	ackMark"
109	eckMark 5 Software
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	5
Original Receipt ID (Only for Corrected/Replacement Transmission)	
	This is a Replacement Transmission This is a Replacement Submission
Create E-File Now	Cancel How to E-File

7. *Optional*: If you need more information on how to set up an E-file account, Click the **How to E-file button**. A pop-up window with important links on how to first apply, create a AIR system account.



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.

	CheckMark <sup>®</sup> 1095 Software	
	The following errors were discovered:	
Transmitter's TIN: Mus' Transmitter Name: Mus Transmitter Company: Transmitter's Mailing Ax Transmitter's City: Mus Transmitter's City: Must Contact FirstName: Mu Contact LastName: Mu	de: Must be 5 alpha/numeric characters. :be 9 digits. tbe between 1 and 40 characters Must be between 1 and 40 characters. divess: Must be between 1 and 40 characters. tbe between 1 and 40 characters. st be a valid U.S. state or territory (name or abbreviation). be of form X000X -X000X. St be between 1 and 40 characters. st be between 1 and 40 characters. st be between 1 and 40 characters. st be between 1 and 40 characters. er: Must be of form X00X-X000X or X00X-X000X ext. X0000X.	

- 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.

000		Save Report					
	Save As: 109 Tags:	4B_Request_55555_2	0170904T2	10			
<> :: = ••• :::		Reports	0		Q Sear	ch	
Favorites	CheckMark Christeling CheckMark Christeling Christeling Coddington.docx Databastility.log Lessy off FIXXXX.ssy.docx COddington.docx Coddingt	<ul> <li>1095</li> <li>Multiledger</li> <li>Payroll</li> </ul>	•	2017		_Configuration _Backups _Reports CheckM_017.db	) ) )
Taos New Folder	GEO essay.docx		1771	9	1	Cancel Sav	re

12. Use the default name. Save the file to a location that is easy to find. The Desktop is an easy location to save the file to and find it there later when you are ready to submit the file to the IRS AIR system. Click **Save.** 

**NOTE:** Keep both files together in same location so the manifest file is with it's corresponding form file to prevent errors.

## **Corrected/Replacement Transmission**

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.

t View Window		
	CheckMark <sup>®</sup> 1095 Software	
	Transmitter Control Code	
	Transmitter TIN	
	Transmitter Name	
	Transmitter Company	
Tri	insmitter Mailing Address	
	Transmitter City	
	Transmitter State	
	Transmitter Zip	
c	ontact Person First Name	
	Contact Person Last Name	
Cont	ect Person Phone Number	
Cont	act Person Email Address	
Original Receipt ID (Only for Corrected/Re	placement Transmission)	
	This is a Replacer This is a Replacer This is a Test File	nent Submission
Cre	ate E-File Now Cancel How	v to E-File

- 2. When you originally submitted your 1095 you would have been sent a Receipt ID confirmation from the IRS. You will need to have the Receipt ID when creating the "Corrected e-file/Replacement Transmission".
- 3. Go to the File menu and select E-file like you normally would. However, when the pop up window opens for you to enter all the transmitter information you will see at the bottom of this page, a field for "Original Receipt Id", enter this for the corrected/ replacement form submission. You need to enter the "Original Receipt Id" that you received after submitting the original files

t View Window	
<b>Che</b> 109	<b>ck</b> Mark <b>5</b> Software
Transmitter Control Code	
Transmitter TJN	
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 a Replacement Transmission
	This is a Replacement Submission
Create E-File Now	Cancel How to E-File

4. Save the E-Files and resubmit

# Chapter 9 Backup and Restore

Making backups is critical to protecting your data. You should always keep current backups. CheckMark 1095 allows you to easily backup your data to any external source for safekeeping.

## **Backing Up Using the Backup Database Command**

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

**NOTE**: Only users with **Admin privileges** can backup and restore a database. For more information on setting up Admin privileges, see "Setting up Users and Passwords" on page 18.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Backup Database.** 

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2. A **Save In** dialog box appears. Choose a destination you would like to save the backup database to.

3. A default name of **backup (with the current date).db** is given. Change the name of the backup if you wish and leave the .db extension.

		Save As: Tags:	CheckMark	1095 Database	2017 Backu					
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4. Click Save.

# **Restoring Database using Restore Database Command**

In case of computer failure, corruption or if you made a mistake and would like to revert back to a previous database, the **Restore Database** command will open any previous backups you have saved.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Restore Database.** 

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Dylan, Bob Jagger, Mick Richards, Keith	Filter	loyee	Open	1 Databa	se			All St	atus	

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

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Music	Health EC.docx	u	п	11	II.
	1	Enable: 1095 Database	Backup (*.db)		Cancel Open

3. Select the file and click **Open.** 

**Important**: Restoring a database file will **overwrite the existing .db file**. Restoring a database file is used in cases of the current file becoming damaged or information being entered incorrectly into the current database. Restoring from a previous database is faster than manually updating the incorrect information.