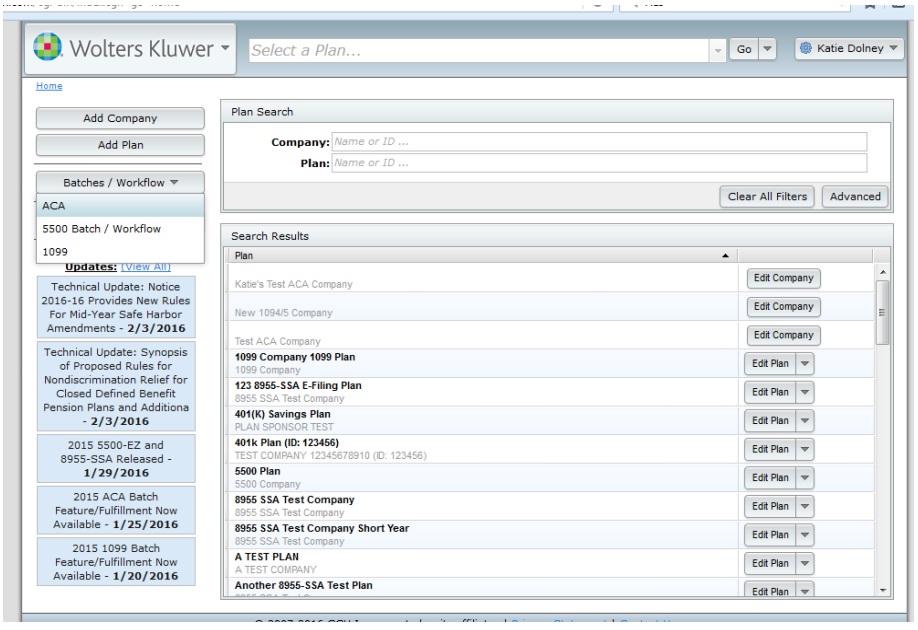
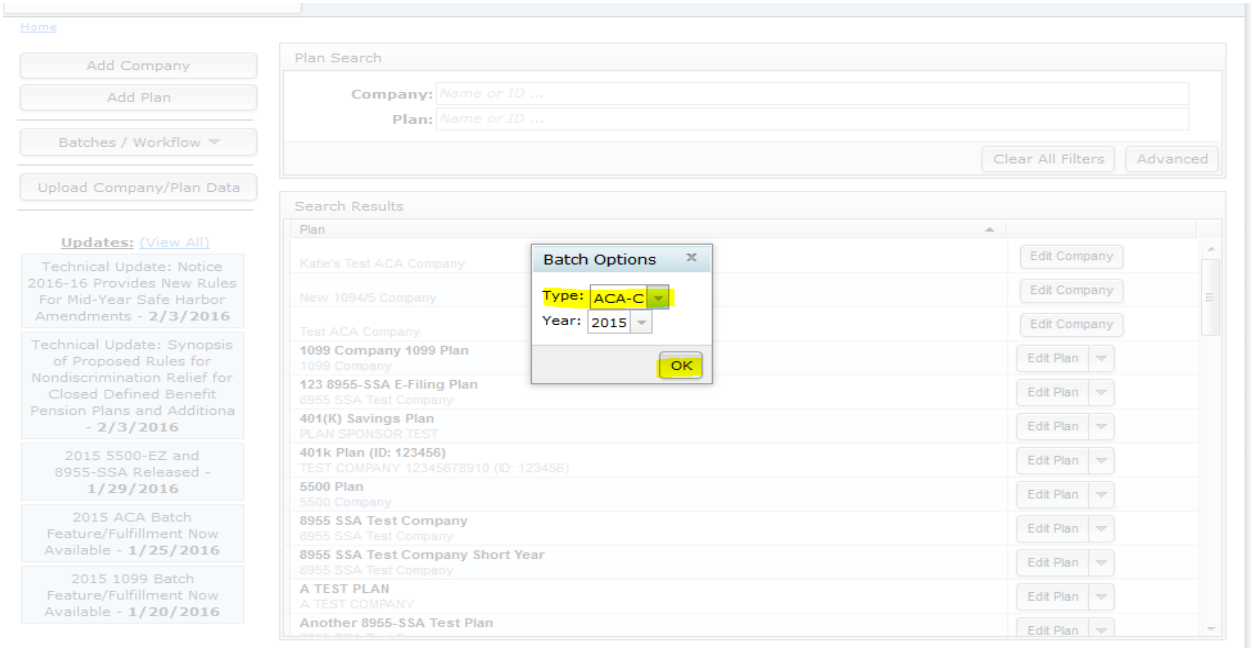
Ftwilliam.com ACA Batch/Fulfillment Notes

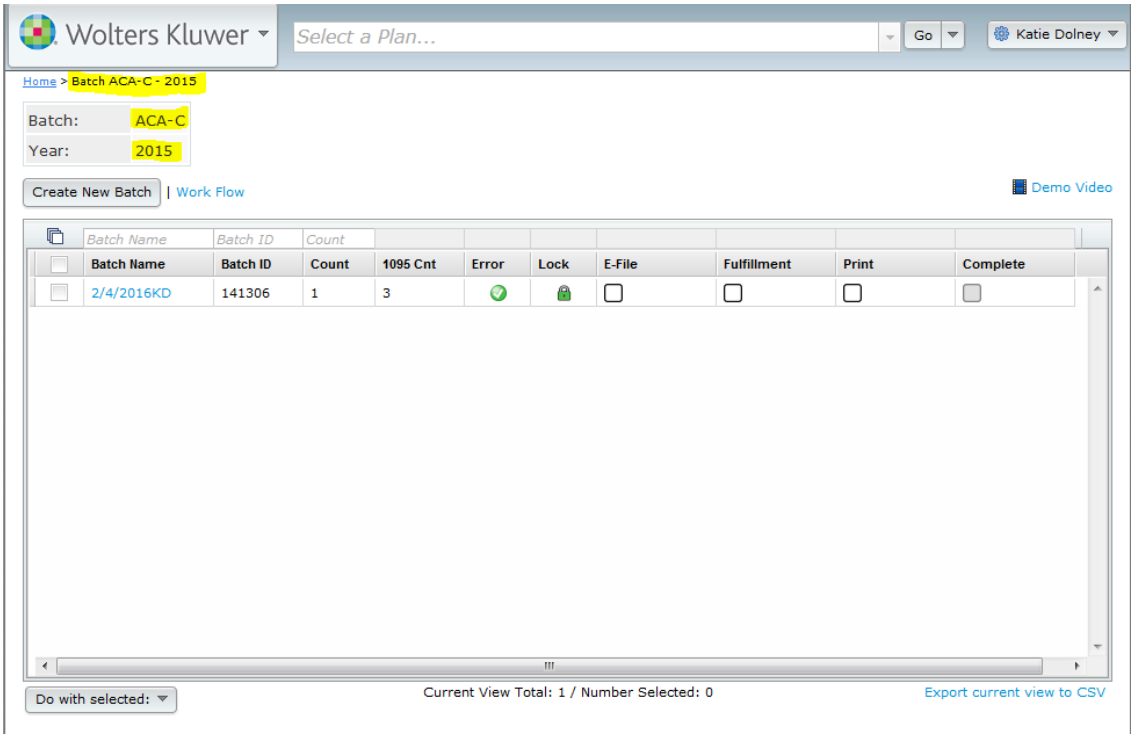
(As of 2/5/2016)

1. You will need to create separate batches based on the B or C Series forms; you cannot add both form-types to the same batch.
2. You may add as many Employers/Employees to the same batch as you would like.
3. You may use the batch feature to print your forms at once for all Employers you have added to your batch; the batch feature is not strictly used for ftwilliam.com's fulfilment service.
4. If using ftwilliam.com's fulfillment service, additional fees apply. Please click here for pricing information and here for a demonstration on how to create a batch to print or use the fulfillment service.
5. If you select the "E-File" option to have ftwilliam.com e-file your 1094/1095 forms to the IRS on your behalf, you will see that the batch portion tied to e-filing is reflected as "Pending". The E-File feature will be made available in the coming weeks, but before the IRS deadline. We will send an email notification once the forms are able to be processed with the IRS, but you will notice that your batches that have been submitted will update from "Pending" to "In Process" as well once the feature is available. Note: if you need to update your forms during this time, please contact support@ftwilliam.com for further assistance, as we will be able to unlock your batch, allow you to make changes and re-submit for fulfillment.
6. Here are the basic steps to creating a batch to either print the forms yourself, or submit for a fulfillment service option:
    a. Home screen-> Batches/Workflow-> ACA-> Select form type-> OK.

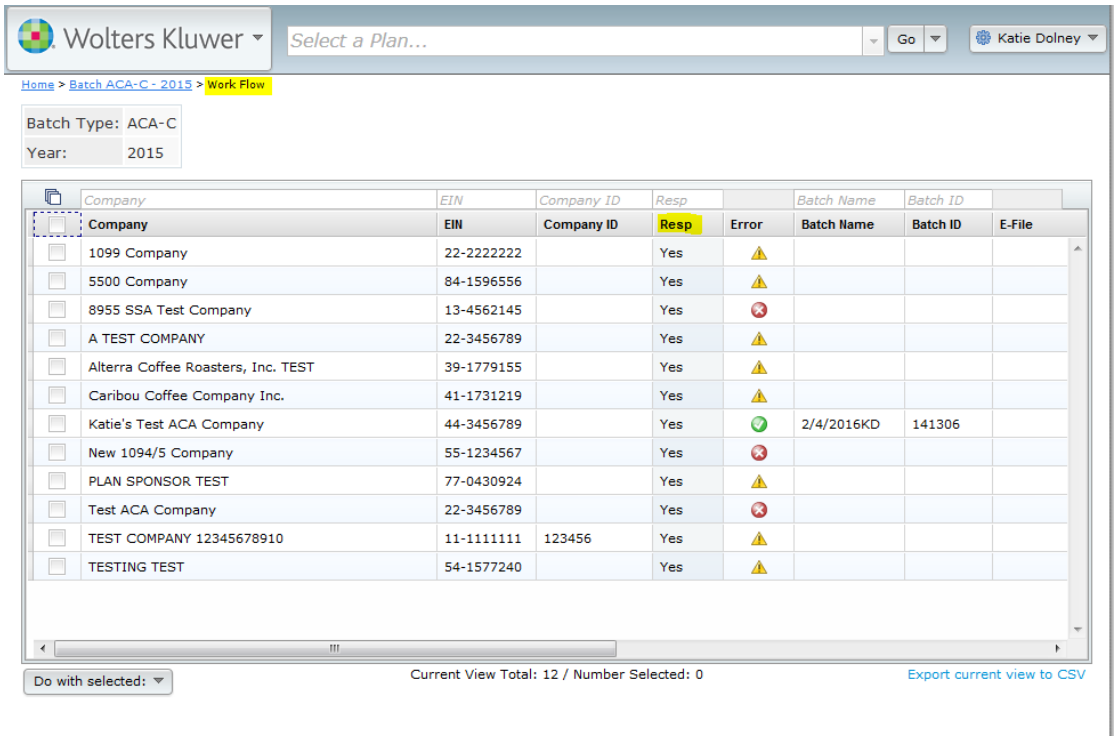




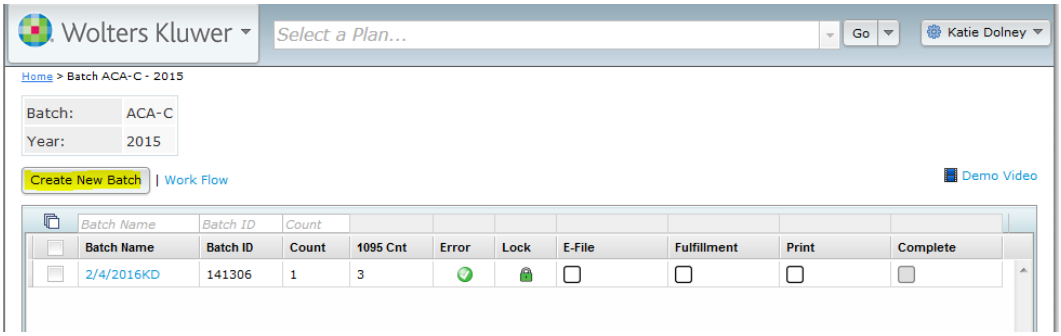
b. Main ACA Batch screen (form type and year will display at the top).



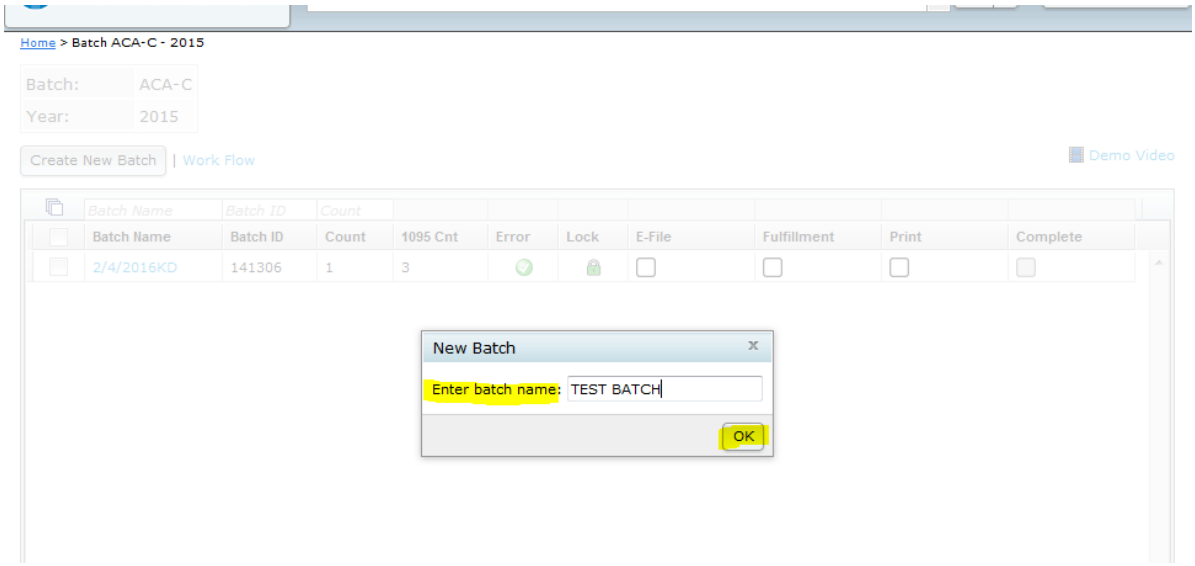
c. Click on the "Workflow" link to ensure all of your Employers (Companies) are listed as "Yes" for "Resp for." You will not be able to add an Employer (Company) to a batch if "No" is listed.



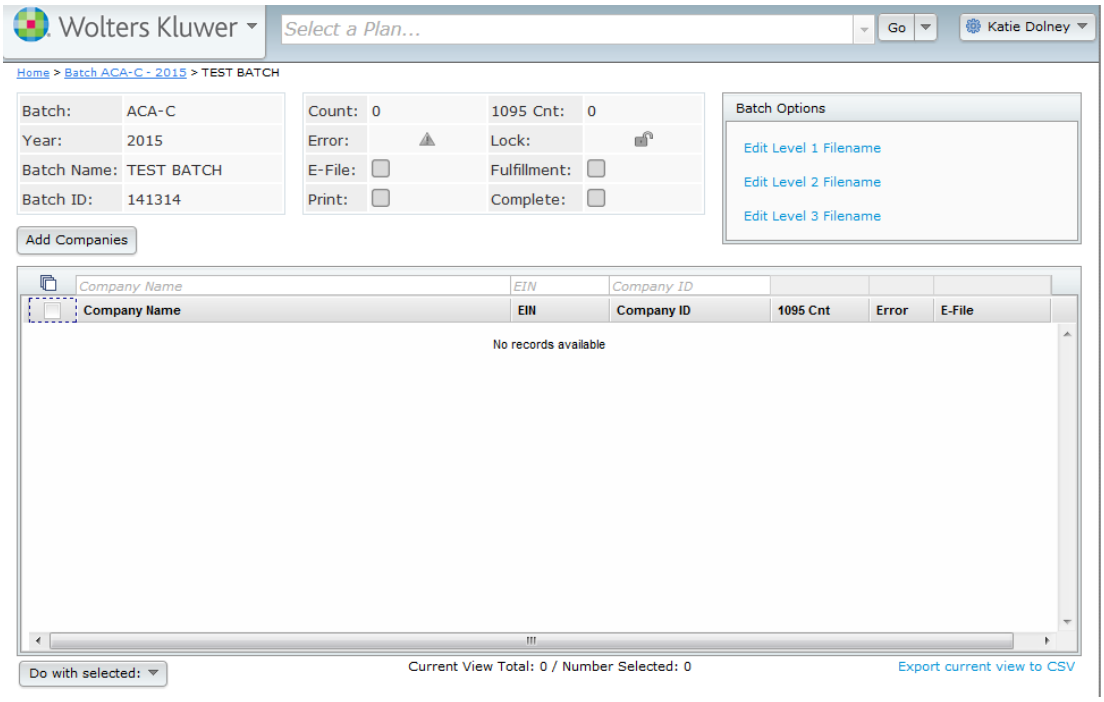
d. Return to the main ACA Batch screen.
e. Click on “Create New Batch”.



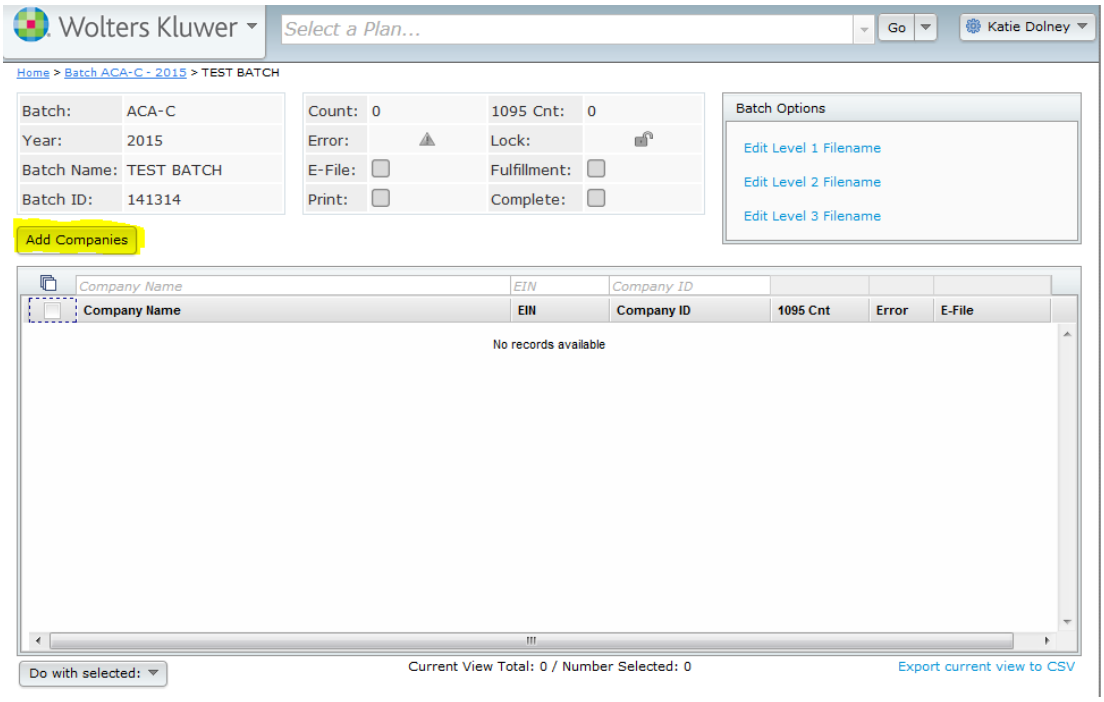
f. Enter your batch name.



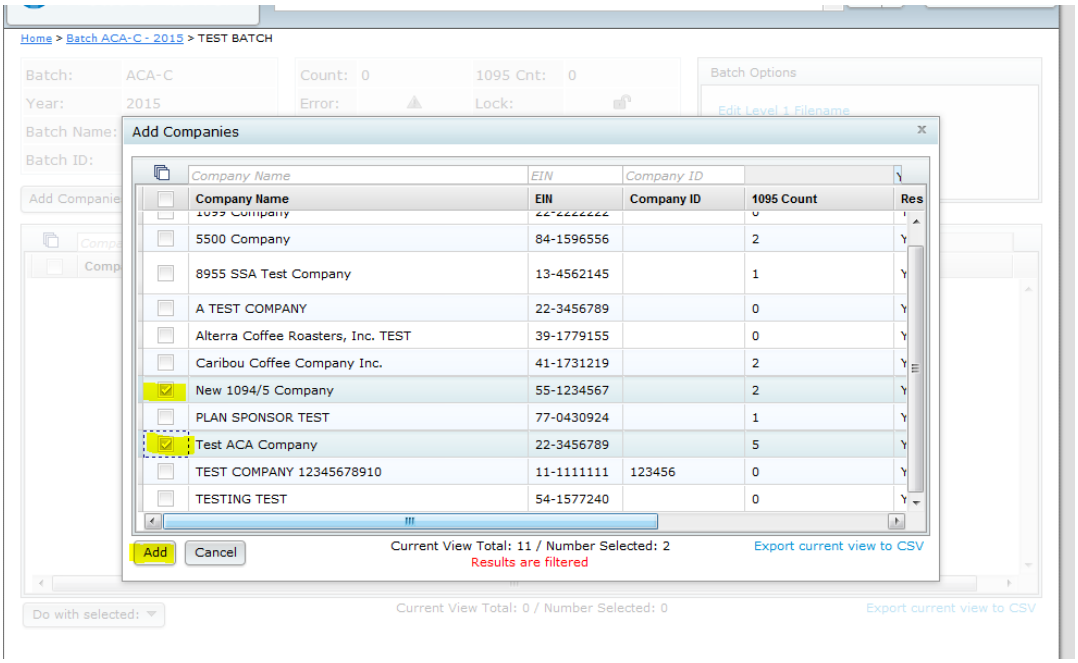
g. Click on "OK".
h. You are now on your batch screen.



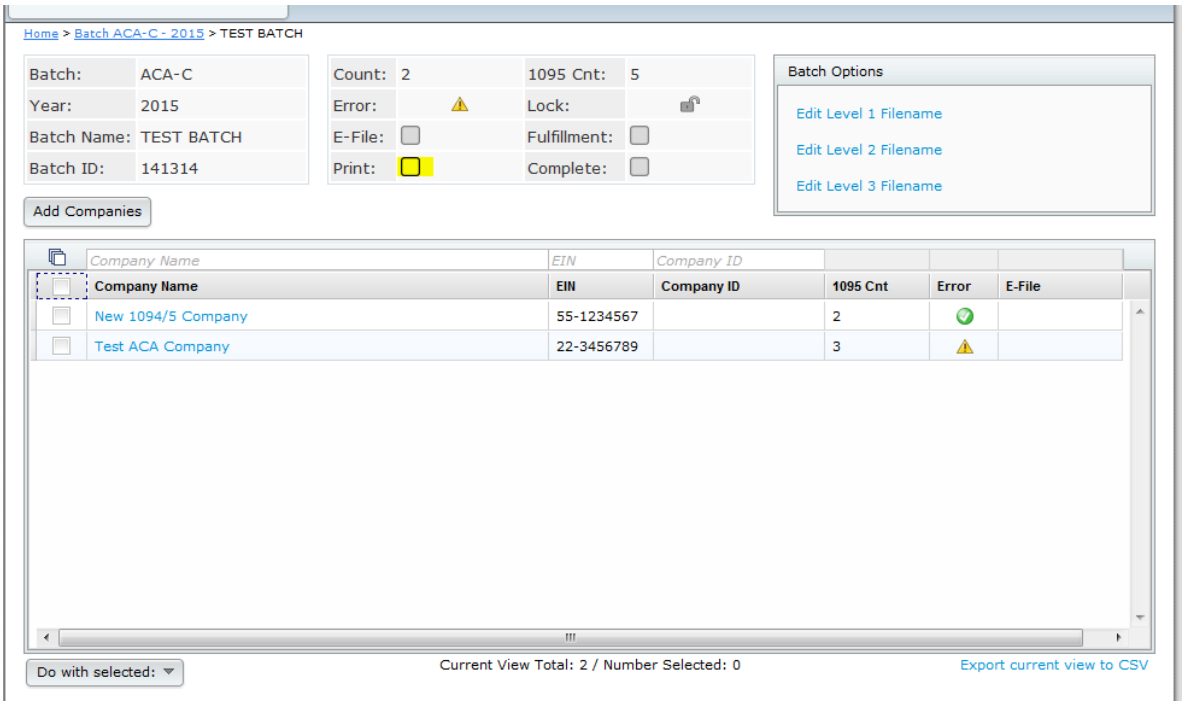
i. Click on "Add Companies" to add companies to your batch.



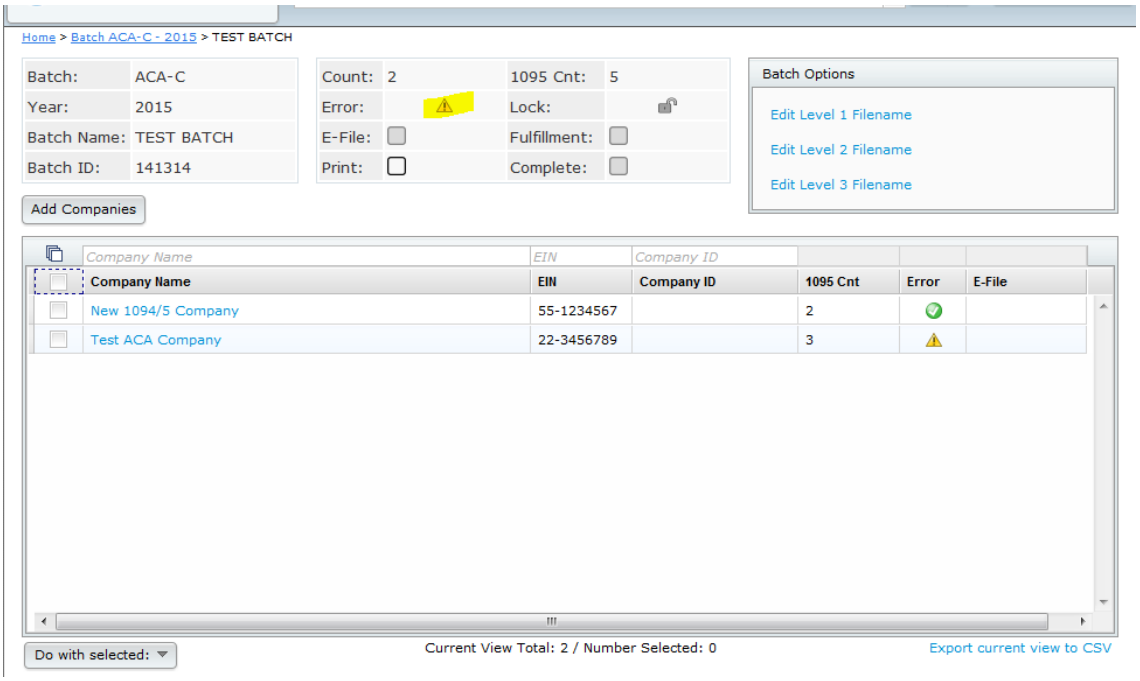
j. Check the box(es) next to the company(ies) you would like to include in your batch.



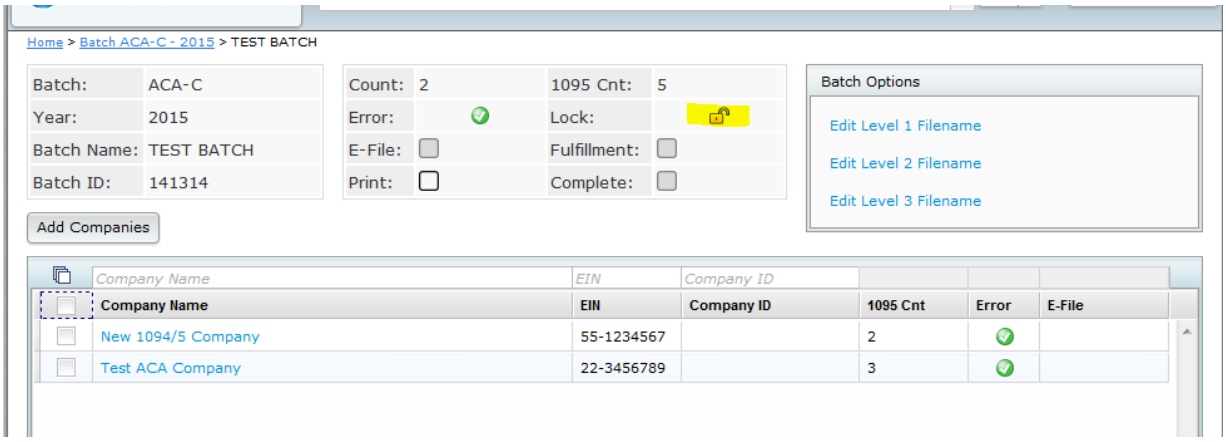
k. Click on “Add”.
l. Your company(ies) has now been added.
m. You may go ahead and print your forms at this point for all company(ies) in your batch by checking the box next to “Print”.



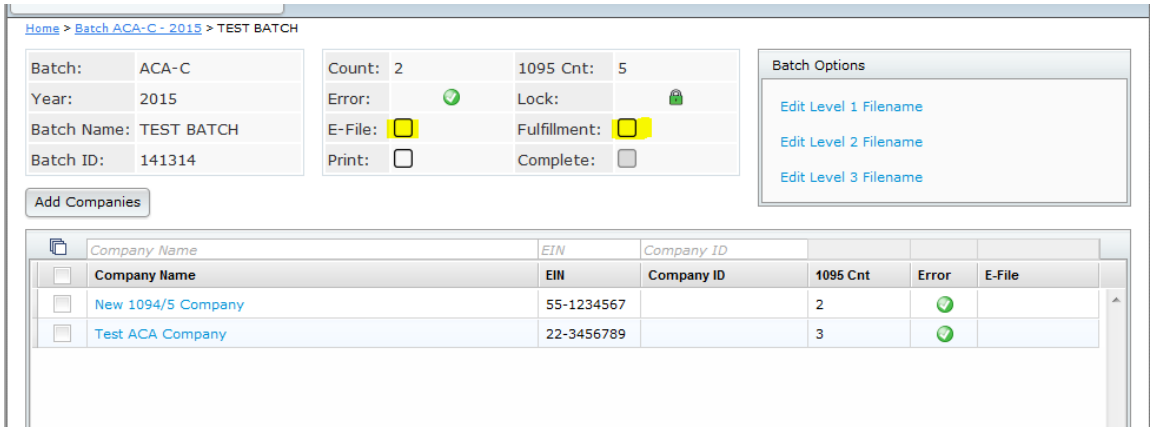
n. If you would like to submit your batch to ftwilliam.com for fulfillment, your batch will need to pass all edit checks. Click on the yellow triangle in the "Error" column to run edit checks for your company.



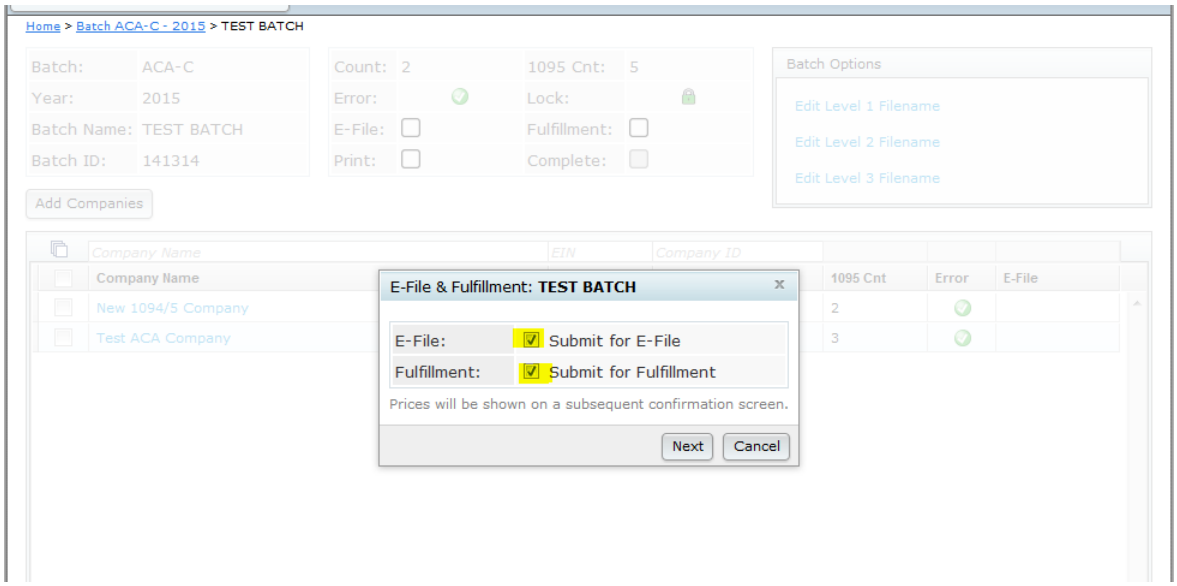
o. Once your batch passes all edit checks, click on the unlock symbol next to "Lock".



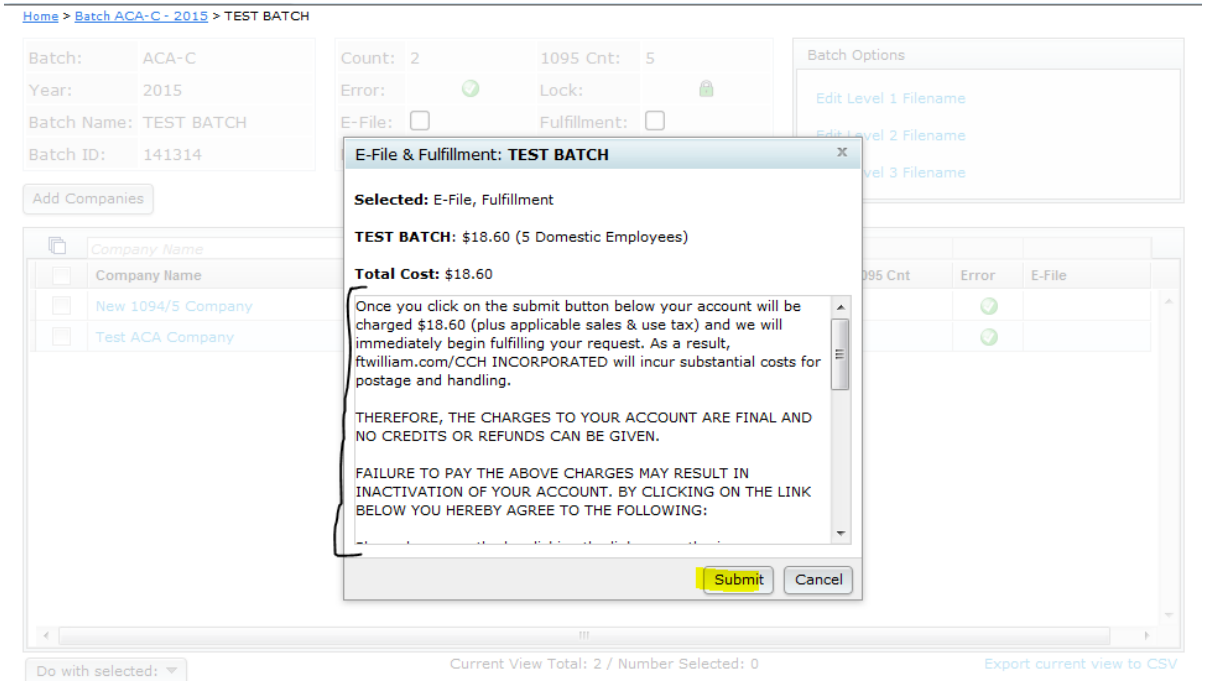
p. Check the box next to “E-File” or “Fulfillment”.



q. Choose the fulfilment service option(s): E-File = ftwilliam.com will e-file your forms in your batch to the IRS; Fulfillment = ftwilliam.com will print/mail the forms to the Employees in the batch.

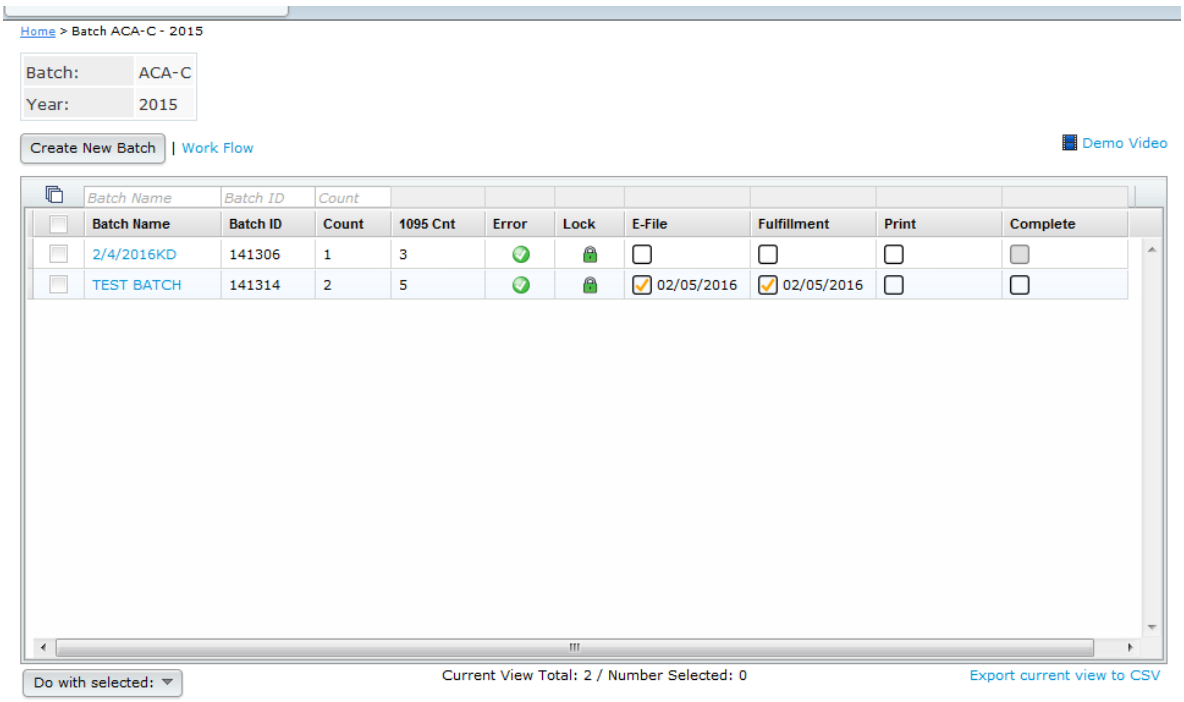


r. Agree to the charges.



s. Submit for fulfillment.

t. Your batch will now reflect as "Pending". **Pending** = ftwilliam.com has received your batch submission; **In Process** = the IRS has received your submission (if the "In Process" date is on or before the filing deadline, the forms in the batch are considered timely filed); **Completed** = the IRS has completed the processing of your batch.



u. The entire process, from start-to-finish, for your batch to change from "Pending" to "Completed" should be around 4-5 business days.