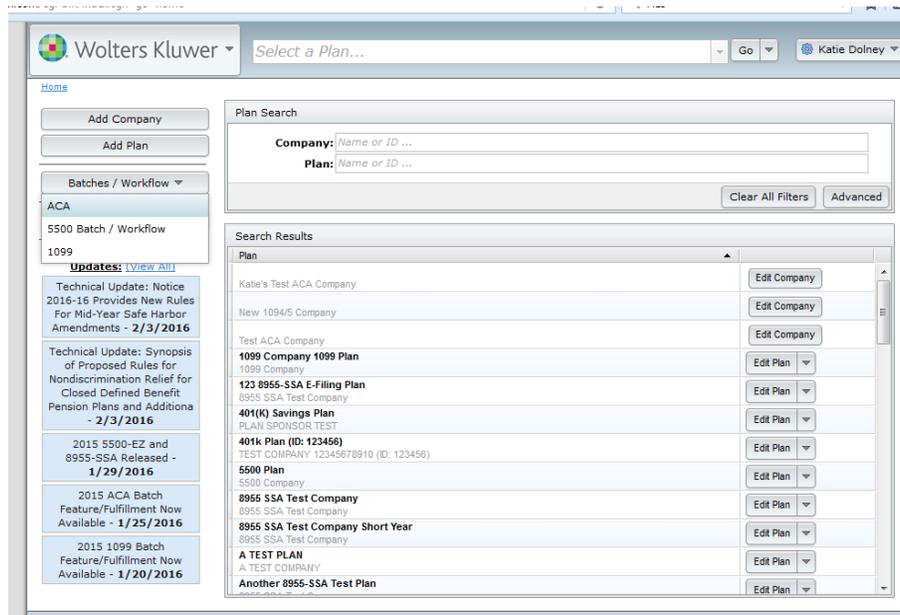


Ftwilliam.com ACA Batch/Fulfillment Notes

(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 fulfillment 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.



Home

Add Company

Add Plan

Batches / Workflow

Upload Company/Plan Data

Updates: [\(View All\)](#)

Technical Update: Notice 2016-16 Provides New Rules For Mid-Year Safe Harbor Amendments - 2/3/2016

Technical Update: Synopsis of Proposed Rules for Nondiscrimination Relief for Closed Defined Benefit Pension Plans and Additional - 2/3/2016

2015 5500-EZ and 8955-SSA Released - 1/29/2016

2015 ACA Batch Feature/Fulfillment Now Available - 1/25/2016

2015 1099 Batch Feature/Fulfillment Now Available - 1/20/2016

Plan Search

Company:

Plan:

Clear All Filters Advanced

Search Results

Plan	
Kate's Test ACA Company	Edit Company
New 1094/5 Company	Edit Company
Test ACA Company	Edit Company
1099 Company 1099 Plan	Edit Plan
1099 Company	
123 8955-SSA E-Filing Plan	Edit Plan
8955 SSA Test Company	
401(k) Savings Plan	Edit Plan
PLAN SPONSOR TEST	
401k Plan (ID: 123456)	Edit Plan
TEST COMPANY 12345678910 (ID: 123456)	
5500 Plan	Edit Plan
5500 Company	
8955 SSA Test Company	Edit Plan
8955 SSA Test Company	
8955 SSA Test Company Short Year	Edit Plan
8955 SSA Test Company	
A TEST PLAN	Edit Plan
A TEST COMPANY	
Another 8955-SSA Test Plan	Edit Plan

Batch Options

Type: ACA-C

Year: 2015

OK

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

Wolters Kluwer

Select a Plan... Go Katie Dolney

Home > Batch ACA-C - 2015

Batch: ACA-C

Year: 2015

Create New Batch | Work Flow Demo Video

Batch Name	Batch ID	Count	1095 Cnt	Error	Lock	E-File	Fulfillment	Print	Complete
2/4/2016KD	141306	1	3			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do with selected: Current View Total: 1 / Number Selected: 0 Export current view to CSV

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

Wolters Kluwer Select a Plan... Go Katie Dolney

Home > Batch ACA-C - 2015 > Work Flow

Batch Type: ACA-C
Year: 2015

<input type="checkbox"/>	Company	EIN	Company ID	Resp	Error	Batch Name	Batch ID	E-File
<input type="checkbox"/>	1099 Company	22-2222222		Yes	⚠			
<input type="checkbox"/>	5500 Company	84-1596556		Yes	⚠			
<input type="checkbox"/>	8955 SSA Test Company	13-4562145		Yes	✖			
<input type="checkbox"/>	A TEST COMPANY	22-3456789		Yes	⚠			
<input type="checkbox"/>	Alterra Coffee Roasters, Inc. TEST	39-1779155		Yes	⚠			
<input type="checkbox"/>	Caribou Coffee Company Inc.	41-1731219		Yes	⚠			
<input type="checkbox"/>	Katie's Test ACA Company	44-3456789		Yes	✔	2/4/2016KD	141306	
<input type="checkbox"/>	New 1094/5 Company	55-1234567		Yes	✖			
<input type="checkbox"/>	PLAN SPONSOR TEST	77-0430924		Yes	⚠			
<input type="checkbox"/>	Test ACA Company	22-3456789		Yes	✖			
<input type="checkbox"/>	TEST COMPANY 12345678910	11-1111111	123456	Yes	⚠			
<input type="checkbox"/>	TESTING TEST	54-1577240		Yes	⚠			

Do with selected: Current View Total: 12 / Number Selected: 0 Export current view to CSV

- d. Return to the main ACA Batch screen.
- e. Click on "Create New Batch".

Wolters Kluwer Select a Plan... Go Katie Dolney

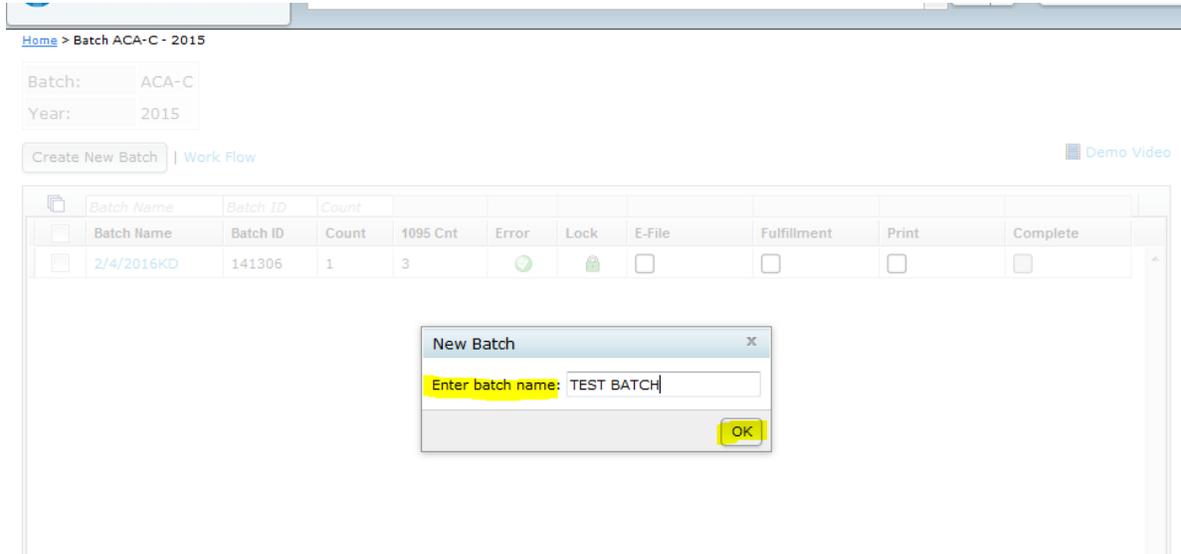
Home > Batch ACA-C - 2015

Batch: ACA-C
Year: 2015

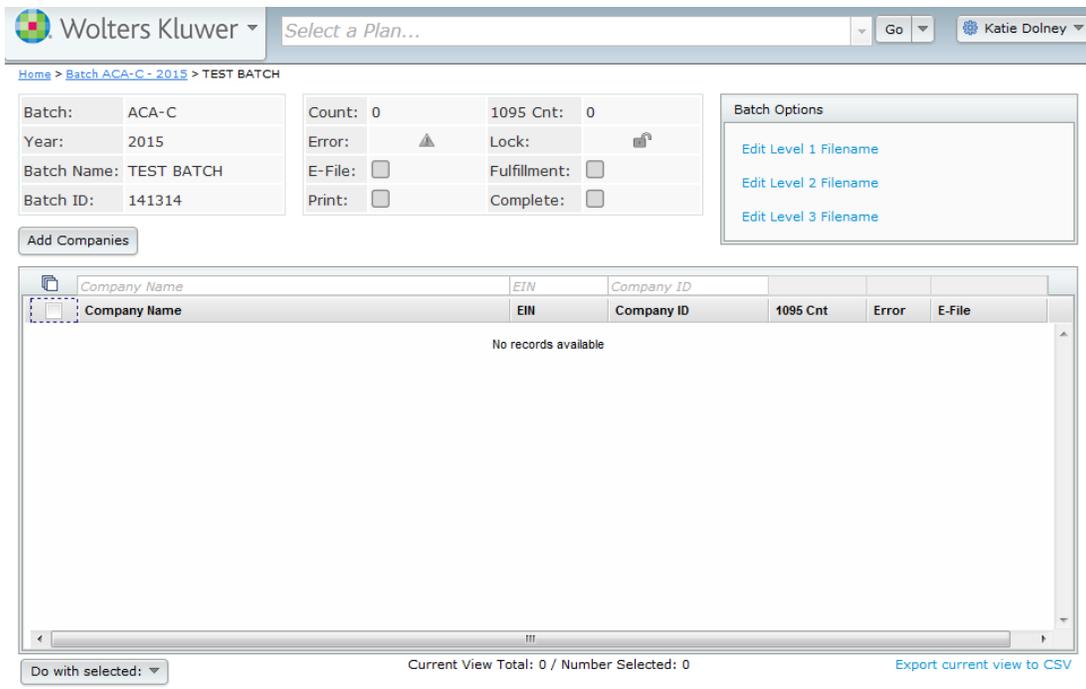
[Create New Batch](#) | [Work Flow](#) [Demo Video](#)

<input type="checkbox"/>	Batch Name	Batch ID	Count	1095 Cnt	Error	Lock	E-File	Fulfillment	Print	Complete
<input type="checkbox"/>	2/4/2016KD	141306	1	3	✔	🔒	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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.

Wolters Kluwer | Select a Plan... | Go | Katie Dolney

Home > Batch ACA-C - 2015 > TEST BATCH

Batch: ACA-C | Count: 0 | 1095 Cnt: 0
 Year: 2015 | Error: ▲ | Lock: 🔒
 Batch Name: TEST BATCH | E-File: | Fulfillment:
 Batch ID: 141314 | Print: | Complete:

Add Companies

Company Name	EIN	Company ID	1095 Cnt	Error	E-File
No records available					

Do with selected: | Current View Total: 0 / Number Selected: 0 | Export current view to CSV

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

Home > Batch ACA-C - 2015 > TEST BATCH

Batch: ACA-C | Count: 0 | 1095 Cnt: 0
 Year: 2015 | Error: ▲ | Lock: 🔒

Batch Name: TEST BATCH | Batch ID: 141314

Add Companies

Company Name	EIN	Company ID	1095 Count	Res
<input type="checkbox"/> 1099 Company	22-2222222		0	Y
<input type="checkbox"/> 5500 Company	84-1596556		2	Y
<input type="checkbox"/> 8955 SSA Test Company	13-4562145		1	Y
<input type="checkbox"/> A TEST COMPANY	22-3456789		0	Y
<input type="checkbox"/> Alterra Coffee Roasters, Inc. TEST	39-1779155		0	Y
<input type="checkbox"/> Caribou Coffee Company Inc.	41-1731219		2	Y
<input checked="" type="checkbox"/> New 1094/5 Company	55-1234567		2	Y
<input type="checkbox"/> PLAN SPONSOR TEST	77-0430924		1	Y
<input checked="" type="checkbox"/> Test ACA Company	22-3456789		5	Y
<input type="checkbox"/> TEST COMPANY 12345678910	11-1111111	123456	0	Y
<input type="checkbox"/> TESTING TEST	54-1577240		0	Y

Current View Total: 11 / Number Selected: 2 | Results are filtered | Export current view to CSV

Do with selected: | Current View Total: 0 / Number Selected: 0 | Export current view to CSV

- 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”.

Home > Batch ACA-C - 2015 > TEST BATCH

Batch:	ACA-C	Count:	2	1095 Cnt:	5
Year:	2015	Error:		Lock:	
Batch Name:	TEST BATCH	E-File:	<input type="checkbox"/>	Fulfillment:	<input type="checkbox"/>
Batch ID:	141314	Print:	<input type="checkbox"/>	Complete:	<input type="checkbox"/>

[Add Companies](#)

Company Name	EIN	Company ID	1095 Cnt	Error	E-File
<input type="checkbox"/> New 1094/5 Company	55-1234567		2		
<input type="checkbox"/> Test ACA Company	22-3456789		3		

Do with selected: Current View Total: 2 / Number Selected: 0 [Export current view to CSV](#)

- 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.

Home > Batch ACA-C - 2015 > TEST BATCH

Batch:	ACA-C	Count:	2	1095 Cnt:	5
Year:	2015	Error:		Lock:	
Batch Name:	TEST BATCH	E-File:	<input type="checkbox"/>	Fulfillment:	<input type="checkbox"/>
Batch ID:	141314	Print:	<input type="checkbox"/>	Complete:	<input type="checkbox"/>

[Add Companies](#)

Company Name	EIN	Company ID	1095 Cnt	Error	E-File
<input type="checkbox"/> New 1094/5 Company	55-1234567		2		
<input type="checkbox"/> Test ACA Company	22-3456789		3		

Do with selected: Current View Total: 2 / Number Selected: 0 [Export current view to CSV](#)

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

Home > Batch ACA-C - 2015 > TEST BATCH

Batch:	ACA-C	Count:	2	1095 Cnt:	5
Year:	2015	Error:	<input checked="" type="checkbox"/>	Lock:	<input type="checkbox"/>
Batch Name:	TEST BATCH	E-File:	<input type="checkbox"/>	Fulfillment:	<input type="checkbox"/>
Batch ID:	141314	Print:	<input type="checkbox"/>	Complete:	<input type="checkbox"/>

Add Companies

Company Name	EIN	Company ID	1095 Cnt	Error	E-File
New 1094/5 Company	55-1234567		2	<input checked="" type="checkbox"/>	
Test ACA Company	22-3456789		3	<input checked="" type="checkbox"/>	

Batch Options

- Edit Level 1 Filename
- Edit Level 2 Filename
- Edit Level 3 Filename

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

Home > Batch ACA-C - 2015 > TEST BATCH

Batch:	ACA-C	Count:	2	1095 Cnt:	5
Year:	2015	Error:	<input checked="" type="checkbox"/>	Lock:	<input type="checkbox"/>
Batch Name:	TEST BATCH	E-File:	<input type="checkbox"/>	Fulfillment:	<input type="checkbox"/>
Batch ID:	141314	Print:	<input type="checkbox"/>	Complete:	<input type="checkbox"/>

Add Companies

Company Name	EIN	Company ID	1095 Cnt	Error	E-File
New 1094/5 Company	55-1234567		2	<input checked="" type="checkbox"/>	
Test ACA Company	22-3456789		3	<input checked="" type="checkbox"/>	

Batch Options

- Edit Level 1 Filename
- Edit Level 2 Filename
- Edit Level 3 Filename

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.

Home > Batch ACA-C - 2015 > TEST BATCH

Batch:	ACA-C	Count:	2	1095 Cnt:	5
Year:	2015	Error:	<input checked="" type="checkbox"/>	Lock:	<input type="checkbox"/>
Batch Name:	TEST BATCH	E-File:	<input type="checkbox"/>	Fulfillment:	<input type="checkbox"/>
Batch ID:	141314	Print:	<input type="checkbox"/>	Complete:	<input type="checkbox"/>

Add Companies

Company Name	EIN	Company ID	1095 Cnt	Error	E-File
New 1094/5 Company	55-1234567		2	<input checked="" type="checkbox"/>	
Test ACA Company	22-3456789		3	<input checked="" type="checkbox"/>	

Batch Options

- Edit Level 1 Filename
- Edit Level 2 Filename
- Edit Level 3 Filename

E-File & Fulfillment: TEST BATCH

E-File: Submit for E-File

Fulfillment: Submit for Fulfillment

Prices will be shown on a subsequent confirmation screen.

Next Cancel

r. Agree to the charges.

Home > Batch ACA-C - 2015 > TEST BATCH

Batch: ACA-C
Year: 2015
Batch Name: TEST BATCH
Batch ID: 141314

Count: 2 1095 Cnt: 5
Error: Lock:
E-File: Fulfillment:

Batch Options
Edit Level 1 Filename
Edit Level 2 Filename
Edit Level 3 Filename

Add Companies

Company Name
<input type="checkbox"/> Company Name
<input type="checkbox"/> New 1094/5 Company
<input type="checkbox"/> Test ACA Company

E-File & Fulfillment: TEST BATCH

Selected: E-File, Fulfillment

TEST BATCH: \$18.60 (5 Domestic Employees)

Total Cost: \$18.60

Once you click on the submit button below your account will be charged \$18.60 (plus applicable sales & use tax) and we will immediately begin fulfilling your request. As a result, ftwilliam.com/CCH INCORPORATED will incur substantial costs for postage and handling.

THEREFORE, THE CHARGES TO YOUR ACCOUNT ARE FINAL AND NO CREDITS OR REFUNDS CAN BE GIVEN.

FAILURE TO PAY THE ABOVE CHARGES MAY RESULT IN INACTIVATION OF YOUR ACCOUNT. BY CLICKING ON THE LINK BELOW YOU HEREBY AGREE TO THE FOLLOWING:

Do with selected: Current View Total: 2 / Number Selected: 0 Export current view to CSV

- 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.

Home > Batch ACA-C - 2015

Batch: ACA-C
Year: 2015

Create New Batch | Work Flow [Demo Video](#)

Batch Name	Batch ID	Count	1095 Cnt	Error	Lock	E-File	Fulfillment	Print	Complete
<input type="checkbox"/> 2/4/2016KD	141306	1	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> TEST BATCH	141314	2	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 02/05/2016	<input checked="" type="checkbox"/> 02/05/2016	<input type="checkbox"/>	<input type="checkbox"/>

Do with selected: Current View Total: 2 / Number Selected: 0 Export current view to CSV

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