

Health Insurance Tax Forms

Overview

The Health Insurance Tax Forms screen is used to store Form 1095-C for both active and inactive employees who enrolled in health coverage for the prior year. In February of each year, a new form for the prior year will be available.

Note: If an employee has been inactive for more than 30 days, the system will terminate his or her login capability, and the employee will need HR to assist in retrieving the form.

Definitions

The following fields are shown on the Health Insurance Tax Forms screen:

- Tax Year – Year in which the user was enrolled. If the user was enrolled at any point during that calendar year, he or she will receive a form.
- Tax Form Type – Identifies the type of tax form. At this time, the only tax forms available are IRS Form 1095-C and IRS Form 1095-C Corrected.
- Form Version – Type of form (original or corrected version). The original is the first form received, and any subsequent form after the original is considered a corrected form.
- Created On – Date form is generated
- Agency, University or BENO Entity Name – Employer for which the user was associated with on the last day of the tax year

Authorization

Users with a security role code of A, E, G, H, N, S, U, X and Y will be able to view forms.

Process Steps

Follow the steps below to access the Health Insurance Tax Form screen. Form 1095-C is available from the 2016 plan year forward.

Step 1: Select Management > My Direct Reports > Search for and select the employee > Benefits > Health Insurance Tax Forms.

Step 2: Select the year. The dropdown defaults to the most current year's form. If there is no form available, the dropdown defaults to the current year. Note: This is the tax year, not the year in which the form is generated. For example, for employees who worked any time in 2016, the system will generate forms in February 2017. In this case, select the 2016 option from the dropdown.

Health Insurance Tax Forms



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Select Year: 2016

Menu View Tax Forms

Step 3: Select the View Tax Forms button. The available forms for the year selected are displayed.

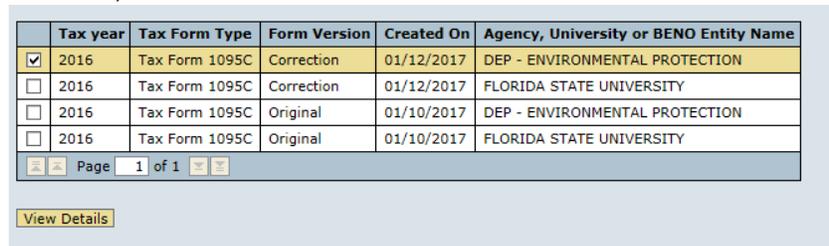


Health Insurance Tax Forms

Select Year: 2016

Menu View Tax Forms

Step 4: Select the check box for the desired form (whether original or corrected).



	Tax year	Tax Form Type	Form Version	Created On	Agency, University or BENO Entity Name
<input checked="" type="checkbox"/>	2016	Tax Form 1095C	Correction	01/12/2017	DEP - ENVIRONMENTAL PROTECTION
<input type="checkbox"/>	2016	Tax Form 1095C	Correction	01/12/2017	FLORIDA STATE UNIVERSITY
<input type="checkbox"/>	2016	Tax Form 1095C	Original	01/10/2017	DEP - ENVIRONMENTAL PROTECTION
<input type="checkbox"/>	2016	Tax Form 1095C	Original	01/10/2017	FLORIDA STATE UNIVERSITY

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View Details

Step 5: Select the View Details button to view the form as a PDF. The PDF document can then be saved or printed.

Special Notes

Employees are notified through two different methods when they have a Form 1095-C available. Employees will receive separate notifications for original and corrected forms. Employees are notified by the following:

- Email sent to the employee's notification email address on file (if applicable) with instructions on how to retrieve the Form 1095-C in People First.
- Alert displayed on home page in People First notifying the employee that the Form 1095-C is available.

My Alerts (2)

- An update has been made to your IRS Form 1095-C for the 2016 tax year. Select the "Health Insurance Tax Form" link to view and print your form(s). If you have questions regarding your form, please contact your tax professional. People First is unable to provide guidance on tax forms.

- Your IRS Form 1095-C for the 2016 tax year is available. Select the "Health Insurance Tax Form" link to view and print your form(s). If you have questions regarding your form, please contact your tax professional. People First is unable to provide guidance on tax forms.

[Check All](#) | [Refresh List](#) | [Remove Alert](#)