

ONESOURCE TAX INFORMATION REPORTING

UNDERSTANDING THE YTD - REPLACEMENT OPTION FOR 1095 FORM FIELD MAPS

Document Version 2

2018 Thomson Reuters/ONESOURCE. All Rights All Rights Reserved. Proprietary and confidential information of Thomson Reuters. Disclosure, use, or reproduction without the written authorization of TR /S is prohibited. In compliance with the license agreements for the Open Source Libraries leveraged by Thomson Reuters, our customers can obtain copies of these libraries by contacting Customer Support at <https://tax.thomsonreuters.com/support/onesource/customer-center/>.

DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	April 2016	Initial Publication
2	January 2, 2018	Initial publication of new document format.

TABLE OF CONTENTS

Understanding the YTD-Replacement Option for 1095 Form Field Maps	1
Using the YTD-Replacement Option	2
Selecting the YTD-Replacement Option for 1095 Form Field Maps	2
Removing Forms or Covered Individuals	3
Selecting the VOID Check Box On Form 1095-B or 1095-C	4

UNDERSTANDING THE YTD-REPLACEMENT OPTION FOR 1095 FORM FIELD MAPS

ONESOURCE Tax Information Reporting supports the **YTD-Replacement** option for 1095 form field maps. The **YTD-Replacement** option can be used to import source files that include coverage details for current and prior months, which may or may not have been imported into ONESOURCE Tax Information Reporting. When the **YTD-Replacement** option is used, the latest import replaces all of the detail records from the prior periods based on the source system code for the form field map. This same source system code must be used when details are manually added, updated or deleted using a detail page in ONESOURCE Tax Information Reporting. If the source system code is not used, the addition, change or deletion will not be retained when the subsequent import occurs.



If you plan to use the **YTD-Replacement** option, you should import only files that have full records (called a full file). When a subsequently imported file includes some (but not all) previously imported forms, ONESOURCE Tax Information Reporting will mark the forms that are not included in the file as deleted.

The following example shows how the **YTD-Replacement** option works for three subsequent imports:

File 1: This file contains a record for John Doe, who has a coverage period from January through March. After you import File 1, a Form 1095-B is created for John Doe. The months of coverage indicated in Part IV, column (e) are January, February and March.

File 2: This file contains two records: one for John Doe and one for Mary Smith. John Doe's record indicates that his coverage period changed to January and February only. Mary Smith's record is new and her coverage period is from January through December. After you import File 2, you notice that:

- John Doe's Form 1095-B shows that the months of coverage indicated in Part IV, column (e) are January and February. If John Doe's Form 1095-B had been printed and/or filed prior to importing File 2 then a correction would have been triggered.
- For Mary Smith, a Form 1095-B is created, and Part IV, column (d) indicates that she was covered all 12 months.

File 3: This file contains only a record for Mary Smith, and her coverage period is unchanged. After you import File 3, you notice that:

- John Doe's Form 1095-B is marked as deleted because a record for John Doe did not exist in File 3. If John Doe's Form 1095-B had been printed and/or filed prior to importing File 3, then a correction would have been triggered.
- Mary Smith's Form 1095-B remains unchanged.



See [Removing Forms or Covered Individuals \(page 3\)](#) for details on removing a covered

USING THE YTD-REPLACEMENT OPTION

If you want to use the **YTD-Replacement** option for your 1095 form field maps, ONESOURCE Tax Information Reporting strongly recommends:

- Importing only full files. If a partial file is imported after a full file is imported, then the forms that are not included in the partial file will be marked as deleted.
- Applying all additions, changes and deletions to your source system prior to transferring your source files for import. If manual additions, changes or deletions are made using the Form Detail page in ONESOURCE Tax Information Reporting, then the record must be tagged with the source system code for the addition, change or deletion to be retained when a subsequent source file is imported.
- If you use Secure Web Services, implementing a process for applying changes made via Secure Web Services to your source system prior to transferring your source file for import. Any changes not applied to your source system prior to transferring your source files for import may be overwritten by the import process.

SELECTING THE YTD-REPLACEMENT OPTION FOR 1095 FORM FIELD MAPS

To select the **YTD-Replacement** option for a 1095 form field map:

1. Access the Form Field Map page for the field map. To access the Form Field Map page, click the **Import** module, select **Field Maps** from the Side Menu then select the **Map Name** link for the field map you want to enable the **YTD-Replacement** option for.
2. Select the **YTD-Replacement** option under the **Field Maps** section.
3. Enter the source system code for they source file in the **Source System Code** field.



The source system code must be unique for each source file. The code does not need to be



in your source system and can be entered into the field map.

Is this a **Year-to-date (YTD) map?**

Non-YTD map

YTD – Replacement (Source file contains detail transactions for current and prior periods which may or may not have been previously loaded. The latest import would replace all the prior periods detail records based on the Source System Code.)

Source System Code:

* Type	Field Description	Column #	Allowed	Default Value	Translate
* xGenericForm	Payer Code	<input type="text"/>	20	<input type="text"/>	Default (No Xref Available)
* xGenericForm	Recipient TIN	<input type="text"/>	11	<input type="text"/>	
* xGenericForm	Recipient Group	<input type="text"/>	30	<input type="text"/>	Default (No Xref Selected) ▾
* xGenericForm	Form Code	<input type="text"/>	2	<input type="text"/>	Default (No Xref Available)
* xGenericForm	Taxable State	<input type="text"/>	2	<input type="text"/>	Default (No Xref Available)
xGenericForm	Recipient TIN Type	<input type="text"/>	2	<input type="text"/>	Default (No Xref Selected) ▾

1095-A
1095-A SHOP
1095-B
1095-C
MA 1099-HC

4. Click **Save**.

REMOVING FORMS OR COVERED INDIVIDUALS

The following table provides scenarios for the action you need to take in your YTD file if you want to remove one or more 1095-B or 1095-C forms or covered individuals:

FORM PRINTED?	NUMBER OF FORMS FOR RECIPIENT?	WANT TO REMOVE ONE OR MORE COVERED INDIVIDUALS?	WANT TO REMOVE ONE OR MORE FORMS?	ACTION TO TAKE IN YTD FILE
No	One	No	Yes	Do not include the form.
No	One	Yes	No	Do not include the covered individual.
Yes	One	No	Yes	Include the form, but mark the form as Void. See IRS requirements below.
Yes	One	Yes	No	Do not include the covered individual.
No	Multiple	No	Yes	Do not include the form.
No	Multiple	Yes	No	Do not include the covered individual.

FORM PRINTED?	NUMBER OF FORMS FOR RECIPIENT?	WANT TO REMOVE ONE OR MORE COVERED INDIVIDUALS?	WANT TO REMOVE ONE OR MORE FORMS?	ACTION TO TAKE IN YTD FILE
Yes	Multiple	No	Yes	Include the form, but mark the form as Void. See IRS requirements below.
Yes	Multiple	Yes	No	Include the covered individual in your YTD file and remove the coverage months for that covered individual record.

SELECTING THE VOID CHECK BOX ON FORM 1095-B OR 1095-C

Provide the following in the YTD import file when a recipient received a Form 1095-B in error and the form was printed and/or filed:

1. Mark the form as VOID.
2. Provide all covered individuals in the import file with blank coverage months.

Provide the following in the YTD import file when a recipient received a Form 1095-C in error and the form was printed and/or filed:

1. Mark the form as VOID.
2. Provide all covered individuals in the import file with blank coverage months.
3. Provide a **0** for self-insured coverage indicator. This will uncheck part III self-insured coverage box.
4. For Box 14, provide only code **1H** in **All 12 Months** showing that the recipient was not offered coverage.
5. For Box 15, do not provide a dollar amount.
6. For Box 16, provide only code **2A** in **All 12 Months** showing that the recipient was not employed during the year.