



Springbrook – Getting Ready for Affordable Care Act

Agenda

- Resources and Access to ACA Database Solution
- Database tips
- Data Extraction and preparation
- Batch overview – Details on December 9th webinar
- Importing
- Electronic filing

Resources

- Springbrook Community – Affordable Care Act Playbook.

<https://enterprisehelp.springbrooksoftware.com/m/107867>

IRS.gov – 1094/1095C instructions

<https://www.irs.gov/pub/irs-pdf/i109495c.pdf>

Affordable Care Act Information Returns (AIR) Program page

<https://www.irs.gov/e-file-providers/air/affordable-care-act-information-return-air-program>

Due Dates for Filing

- If you are filing 10 or more information returns for 2025, you must file electronically.
- 1095-C forms are no longer required to be automatically sent to employees, they can be furnished upon request.
- Filings to the IRS are due by March 2, 2026, if filing on paper and March 31, 2026, if filing electronically.

What's New

Alternative manner of furnishing statements.

Employers no longer have to automatically send Form 1095-C to individuals. The requirement for furnishing the statement is met if the employer responsible for providing the statements provides clear, conspicuous, and accessible notice on its website that an individual may request a copy of their statement and the copy is timely furnished. For this purpose, the statement is timely furnished if provided to the individual no later than the later of January 31, 2026, or 30 days after the date of the request. For additional guidance, see [IRS.gov/irb/2025-11_IRB#NOT-2025-15](https://www.irs.gov/irb/2025-11_IRB#NOT-2025-15).

Access to Springbrook ACA Solution

- For on-premise hosted Springbrook Enterprise (v7), KVS, and SoftRight customers, access to the solution will be provided. If you did not already receive the email, it should arrive by EOD 12/9.
 - User was created based on last year's usage and email communication will be sent directly to users from cheryl.weimer@sprbrk.com with subject: "Springbrook 2025 Affordable Care Act reporting is ready."
 - A preceding email was sent on 12/1 from cheryl.weimer@sprbrk.com with subject: "Springbrook 2025 Affordable Care Act Solution." If you didn't get this email, please contact Support.
- Cloud hosted customers have access already to the ACA solution in their Springbrook Cloud Payroll. The Software ID has been updated for the filing year of 2025.

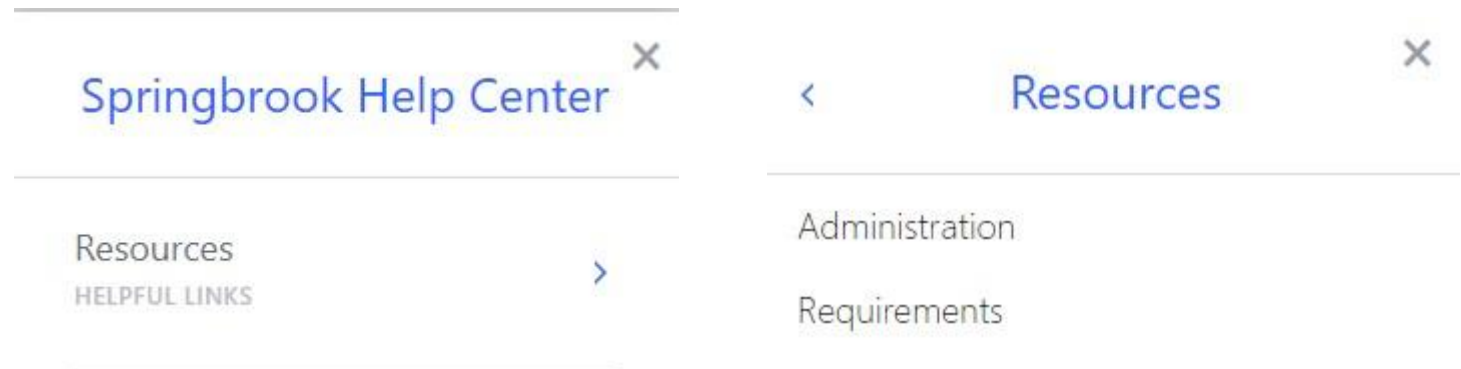
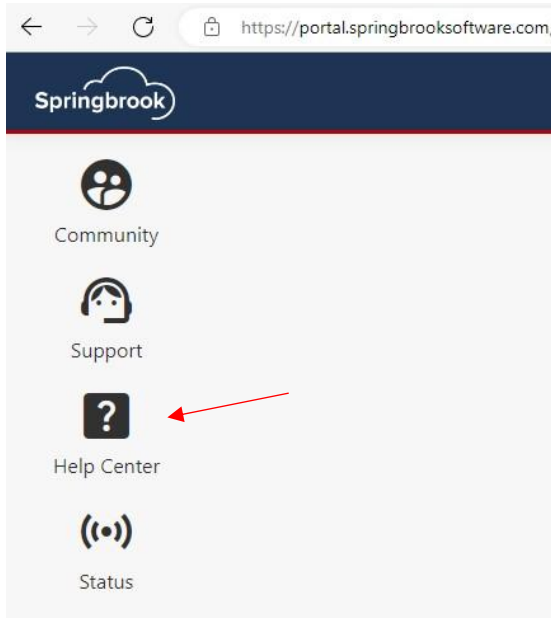
To log in to your Springbrook ACA Database

To access your Springbrook ACA solution, go to <https://portal.springbrooksoftware.com/> and follow the steps below to get logged in. Please also refer to our [user login guide](#) for more information.

1. Enter your email address and then select the continue option.
2. At the Enter Your Password step select the Forgot Password? option.
3. In the Forgot Your Password? step you should see the email address you entered earlier. Select the Continue option.
4. Open your email and look for an email from no-reply@springbrooksoftware.com. In the email select the link to set the initial password for your user.
5. Enter your desired password. You will be provided with guidance on requirements. Once your password is established select the option to return to login.
6. On return to login log in with your email address and password.
7. You will be presented with an option to select your multi-factor-authentication (MFA) method - Authenticator App, Security Key, Phone (voice call or text message). Select the method you would like to use and then follow the steps to configure it.
8. On successfully establishing MFA you will be logged into our application portal, and you will see the option to launch either our Springbrook Enterprise or Cirrus application interface.

The Portal

- Once logged into the portal, you can select either Enterprise or Cirrus to launch that database platform to create your ACA batch.
- Once logged into the portal, you can go to Help Center > Resources > Administration for troubleshooting help or go to Requirements for our Hardware and Software Requirements.



To use your Springbrook ACA Database

Please note the following regarding using the Springbrook Enterprise (v7) and Cirrus application interfaces:

- **Springbrook Enterprise**

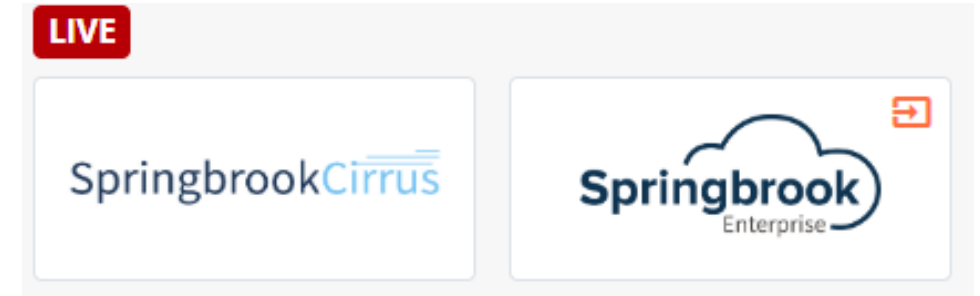
- Requires ClickOnce to be enabled for the browser. The current version of Edge has it enabled by default, for other browsers you will need to add an extension. Internet Explorer is no longer supported.
- Has specific workstation requirements that must be met (OS, .NET version, WebView2 component installed...). Please see our [Hardware & Software Requirements](#) for more information.
- If you are having issues launching Springbrook Enterprise, please refer to our troubleshooting guide <https://help.sprbrk.com/PDF/LoginHelp.pdf>.

- **Cirrus:**

- Fully browser based and can be used from all modern browsers (Safari, Chrome, Mozilla, Edge, etc.).

Cirrus platform is available for all users

- Cirrus is ready to use for processing your ACA batch if you choose to use this platform instead of Springbrook Enterprise. Both options are included in our solution.
- Cirrus has some enhancements to the ACA batch process:
 - If a current Cloud customer, you can use the Generate step and the Self-Insured toggle will now add the employee automatically to the dependent field when checked. If you are a provisioned client, the Generate step is not available to you.
 - This Self-Insured toggle will also pull dependents into the batch from HR (if applicable) when checked.

A screenshot of the Springbrook Cirrus web interface for processing ACA batches. The title bar at the top says 'PR Affordable Care Act'. On the left is a sidebar with three options: 'Overview' (with a person icon), 'Import' (with a cloud icon), and 'Generate' (with a lightning bolt icon and a blue background). The main area on the right contains a 'Calendar Year*' dropdown menu set to '2025', a 'Sort Order' dropdown menu set to 'Employee Number', and a checkbox labeled 'Self-insured coverage provided' which is currently unchecked.

Cirrus Enhancements

- Cirrus Edit Employees enhancements:
 - Grid views on Edit Employee step are formatted to allow users to edit an employee's information, coverage, and dependents all from one window.
 - You also can update multiple/bulk employees at once for some items using the Update Selected option.

PR Affordable Care Act **ACA 2025**

+ EMPLOYEE **EDIT** **REMOVE** **UPDATE SELECTED** **COLUMNS**

	Employee #	Last Name	First Name	Middle Name	SSN	Date of Birth	Address 1	Address 2	City	State
<input checked="" type="checkbox"/>	31274	Erickson	Jill	M	999993298	09/11/1970	1512 Ahrens St		Springbrook	OR
<input type="checkbox"/>	32194	Roehrig	David*M	H	999998082	03/30/1955	2318 Herman Rd		Springbrook	OR
<input type="checkbox"/>	32801	Pfeffer	Chad	P	999998057	03/22/1986	4413 Knuell Ct		Springbrook	OR
<input type="checkbox"/>	31756	Trainor	Michael	S	999993450	11/27/1962	1301 Manila Str...		Springbrook	OR

Edit Employee ACA **CANCEL** **SAVE**

Employee

Employee #* 31274 Middle Name M Address 1 1512 Ahrens St State OR ☒ Self Insured

Last Name Erickson SSN* 999-99-3298 Address 2 Zip 99999-____

First Name Jill Date Of Birth 9/11/1970 City Springbrook Plan Start Month

COVERAGE **DEPENDENTS (1)**

UPDATE SELECTED

<input checked="" type="checkbox"/> January	Coverage Amount 0.00	Coverage Type	Safe Harbor	<input checked="" type="checkbox"/> July	Coverage Amount 0.00	Coverage Type	Safe Harbor
<input checked="" type="checkbox"/> February	Coverage Amount 0.00	Coverage Type	Safe Harbor	<input checked="" type="checkbox"/> August	Coverage Amount 0.00	Coverage Type	Safe Harbor
<input checked="" type="checkbox"/> March	Coverage Amount 0.00	Coverage Type	Safe Harbor	<input checked="" type="checkbox"/> September	Coverage Amount 0.00	Coverage Type	Safe Harbor
<input checked="" type="checkbox"/> April	Coverage Amount 0.00	Coverage Type	Safe Harbor	<input checked="" type="checkbox"/> October	Coverage Amount 0.00	Coverage Type	Safe Harbor
<input checked="" type="checkbox"/> May	Coverage Amount 0.00	Coverage Type	Safe Harbor	<input checked="" type="checkbox"/> November	Coverage Amount 0.00	Coverage Type	Safe Harbor
<input checked="" type="checkbox"/> June	Coverage Amount 0.00	Coverage Type	Safe Harbor	<input checked="" type="checkbox"/> December	Coverage Amount 0.00	Coverage Type	Safe Harbor

+ EMPLOYEE **EDIT** **REMOVE** **UPDATE SELECTED**

	Employee #	Last Name
<input checked="" type="checkbox"/>	31274	Erickson
<input checked="" type="checkbox"/>	32194	Roehrig
<input checked="" type="checkbox"/>	32801	Pfeffer

Coverage
Plan Start Month
Self Insured

Cirrus Enhancements

- Cirrus Edit Employer enhancements:
 - The Edit Employer step has been simplified, removing options that are no longer used by the IRS.

PR Affordable Care Act

ACA 2025

SAVE

Overview

Import

Generate

Edit Employees

Edit Employer

EMPLOYER

CONTACT

Request Type

☐ Aggregated group

☐ Qualifying offer

☐ Authoritative

☐ 98% offer method

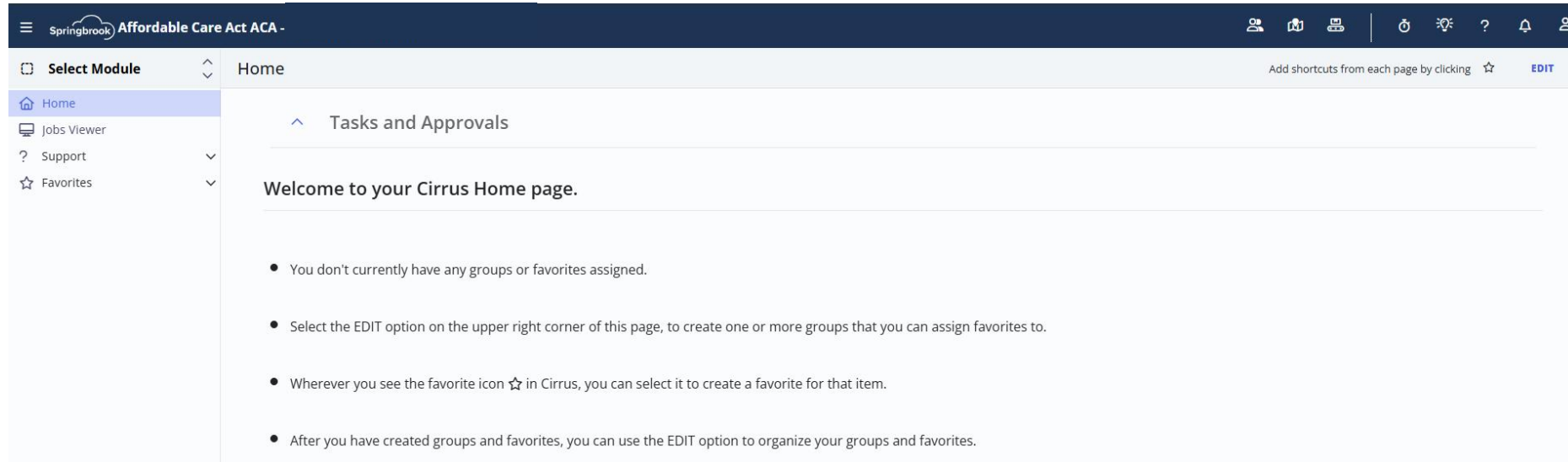
Monthly Employer Data

COLUMNS

Month	Total Employee Count	Eligible FTE Count	Min Essential Coverage	Transition Relief	Aggregated Group
January	0	0			<input type="checkbox"/>
February	0	0			<input type="checkbox"/>
March	0	0			<input type="checkbox"/>
April	0	0			<input type="checkbox"/>

System view when you launch Cirrus as a Provisioned client

- You will see the Cirrus landing page. From here, you'll click on “Select Module” from the upper left.
- You can navigate from there to Payroll and then to Affordable Care Act batch process.



Jobs Viewer



- All jobs (Import, Proof List, Forms, Export) will display in the Jobs Viewer. You will also see them in your Notification Bell but everything (even reports run previously) can easily be found in the Jobs Viewer.
- Click on the Jobs Viewer from the left navigational panel, wherever you are in Cirrus.
- Check the toggle on the left to “Show jobs that didn’t complete due to an error.” This will help you when importing and will display any jobs that need to be reviewed.

Jobs Viewer



★ Jobs Viewer

- ☒ Show jobs that are scheduled
- ☒ Show jobs that are currently processing
- ☒ Show jobs that completed successfully
- ☒ Show jobs that didn't complete due to an error
- ☒ Show jobs that were deleted

User Name

ADMIN

Scheduled From*

12/7/2023

Job Type

(All Job Types)

Scheduled To*

12/7/2023

Batch Type

(No Batch Type Filter)

^ HIDE FILTERS

RESET

SEARCH

Drag a column header here to group its column

PRINT

REFRESH COLUMNS

Details	Description	Status	Start Date/Time	Results	Batch Ty...	Batch	Batch Name	Fiscal Ye...	Fiscal Pe...
---------	-------------	--------	-----------------	---------	-------------	-------	------------	--------------	--------------

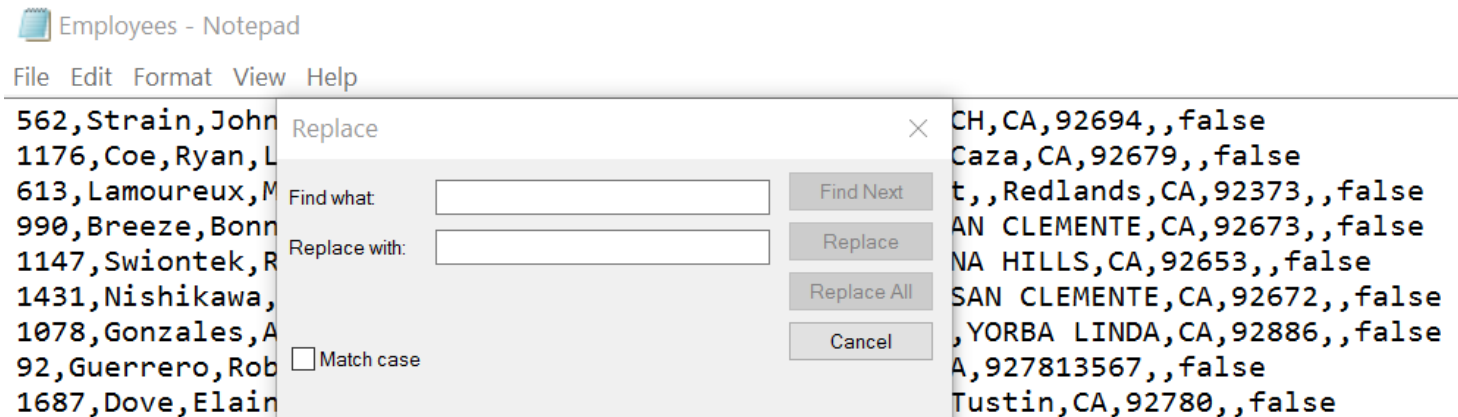
- This box toggled will help you when importing files in case there is an error.
- Window will default to today's date, but any jobs run can be reviewed by changing the dates. Simply click the Search on the middle right to reveal jobs.

Provisioned clients only: You will need to extract data from your Payroll solution to use our cloud hosted ACA solution.

- Detailed information on extracting data from your Payroll solution can be found here:
 - KVS <https://kvshelp.springbrooksoftware.com/a/1365180-affordable-care-act-kvs>
 - SoftRight <https://kvshelp.springbrooksoftware.com/a/1493947-affordable-care-act-softright>
 - Springbrook Enterprise <https://enterprisehelp.springbrooksoftware.com/a/1493575-aca-data-acquisition-for-springbrook-enterprise-clients>
- In Springbrook you can also use Payroll Query by Example (recommended for v7.18).

Getting your data ready to Import

- Use the Data Extraction Utility for your software (Springbrook, KVS or SoftRight)
- If using Springbrook, review the document on Community or call Support to walk you through the process.
- Review data to remove disallowed characters. Do not import SSN dashes. The system will add these for you.
- Open file in Notepad.
 - Use the Replace option under Edit to search for disallowed characters.
 - Type in what you want to replace with. If removing a period or similar character, leave the 'Replace With' field BLANK. Don't add extra spaces.



Disallowed Characters

Here are some of the characters the IRS does not allow in their electronic filing are not allowed in the Affordable Care Act process.

/ (common in address ½)

‘ apostrophe

. Period

(common in address – replace with No)

“ double quotes

< less than


> Greater than

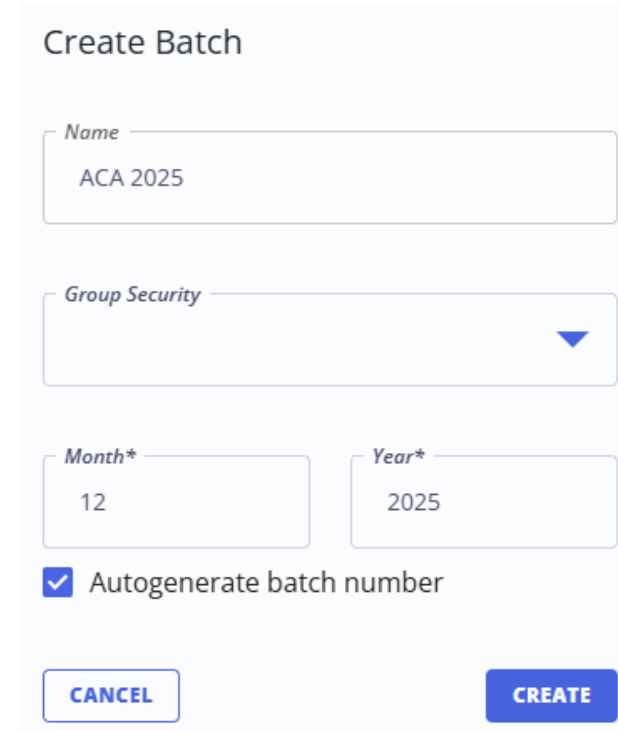
& Ampersand

Disallowed Characters

- Disallowed characters will import but create a Review in the Job Viewer.
- If you are filing on paper (have less than 10 forms) you may be able to file with the disallowed characters, but electronic filings will be rejected.
- Springbrook recommends not using disallowed characters in any filings.
- If you are an existing Cloud Payroll customer, you can use the Generate step to bring Employees in and we have made it function so the system will remove any disallowed characters for you.

Batch Processing

- In Springbrook, many processes are done in batches. The Affordable Care Act process is a batch process.
- From Payroll > Affordable Care Act, click the Create New Batch button. 
- Enter a Name for your batch (not required, but helpful)
- Batch numbers, month, and year are for reference only. You can choose to autogenerate the batch number.



Create Batch

Name

Group Security

Month* Year*

☒ Autogenerate batch number

Batch Processing

- Click on Create **CREATE** to create a batch.
- You are now ready to process the individual batch steps.
- You can have multiple batches open at the same time.

Create Batch

Name
ACA 2025

Group Security
▼

*Month**
12

*Year**
2025

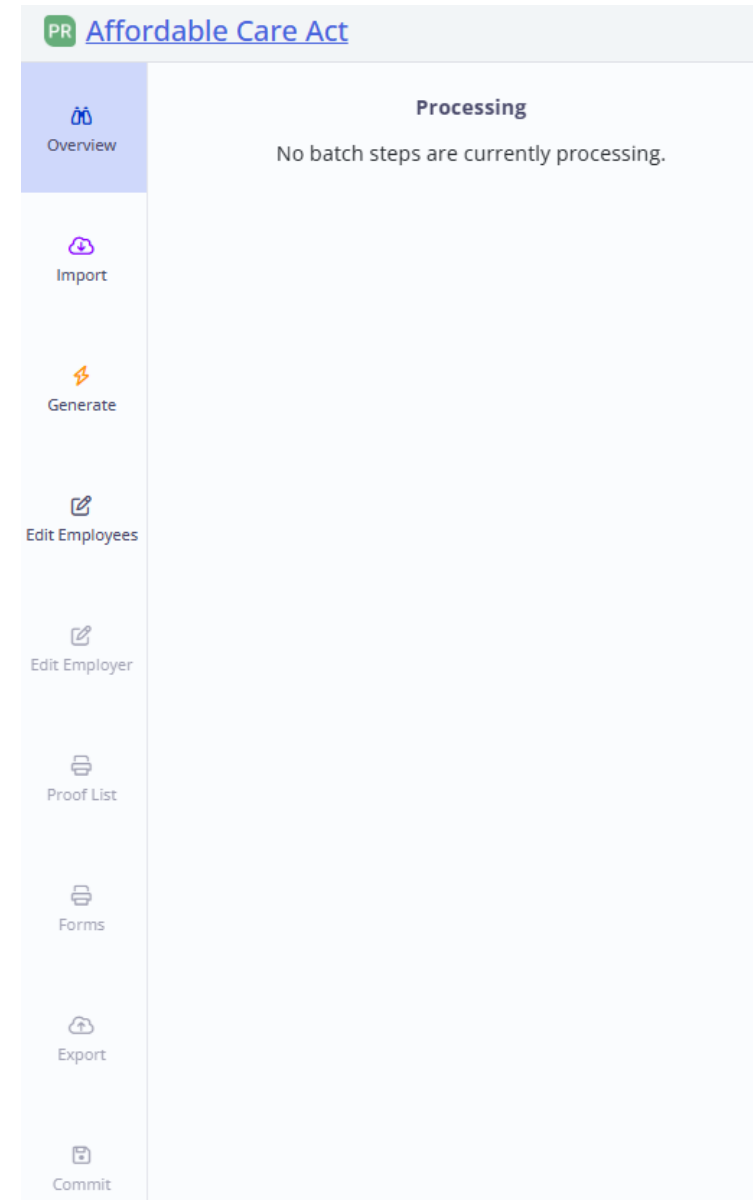
☒ Autogenerate batch number

CANCEL

CREATE

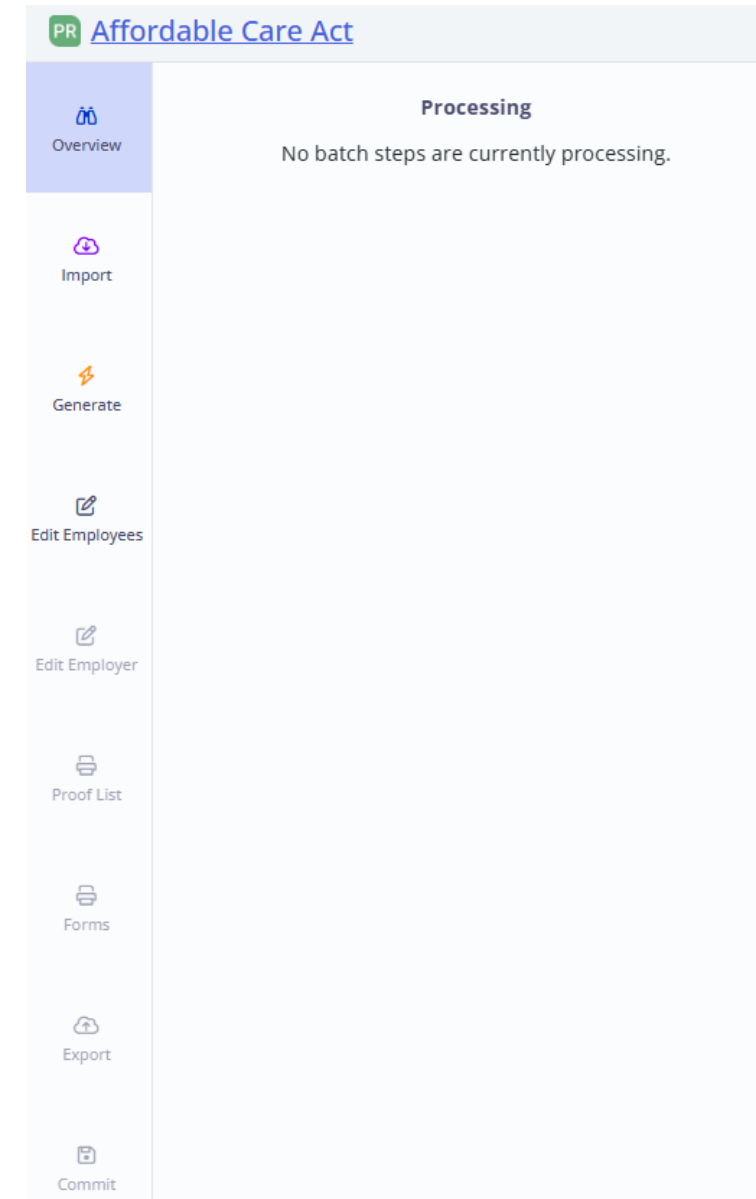
Batch Processing - Steps

- Each step in the batch works separately. The next step cannot be accessed until the step before it is completed.
- Import – Will allow external data to be imported into the batch.
- Generate – ONLY used by existing Cloud Payroll clients.
- Edit Employees – This is where most of your work will be done.
- Edit Employer – Contains employer information required in the export.



Batch Processing – Steps (cont.)

- Proof List – Required to run and provides total Forms count on the last page.
- Forms – This step generates the employee forms and adds required information to the export step.
- Export – Creates the file to electronically upload to the IRS AIR system.
- Commit – All this does is delete the batch information. Best practice is to keep your batch open.



Prepare to Import

- The import process brings in data from CSV spreadsheets and adds the information to the Edit Employees window.
- Extract the data from your existing system (Springbrook, KVS or SoftRight.)
- The data must be in a CSV format and contain the defined number of columns/fields. Check to make sure the Date of Birth column is there. Truncate any Last Names that have more than 20 characters.
- When reviewing exported data from your system consider using Notepad to remove/replace disallowed characters.
- Remember opening a CSV formatted file will delete leading zeros in any column.
 - MOST IMPORTANT in zip codes and Social Security numbers!!!! These fields must contain accurate data.

Import Formats – Employee File

- File formats are at the top right of the Import window.

[VIEW LAYOUT/FORMAT](#)

- All columns must have data or space. Must have 13 columns (A-M).
- The last column (Self Insured) must be True if reporting dependents and False if you are not reporting dependents.

Employee File

[BROWSE...](#)

Or drop files here

File Layout

Index	Layout Info
1	File layout for the Springbrook employee import format (comma delimited).
2	Employee Number
3	Last Name
4	First Name
5	Middle Name
6	SSN
7	Date of Birth
8	Address 1
9	Address 2
10	City
11	State
12	Zip
13	Termination Date
14	Self Insured

Import Formats – Dependent file

- Only used if your agency is considered Self-Insured and must report Dependents.
- If importing Dependents make sure the “Self-Insured” field in the Employee file is marked True.
- Employee number must match the Employee file.
- Must have 18 columns (A-R).
- Must have all the covered months marked either True or False. Yes/No will not import.

Dependent File

BROWSE...

Or drop files here

16	File layout for the Springbrook dependent export format (comma delimited).
17	Related Employee Number
18	Last Name
19	First Name
20	Middle Name
21	SSN
22	Date of Birth
23	Covered for January?
24	Covered for February?
25	Covered for March?
26	Covered for April?
27	Covered for May?
28	Covered for June?
29	Covered for July?
30	Covered for August?
31	Covered for September?
32	Covered for October?
33	Covered for November?
34	Covered for December?

Import Formats – Coverage File

- Coverages can be added directly into the application, so this is not commonly used.
- If you decide to import Coverage, the Month must be spelled out.
- Coverage amount is the amount the employee pays (per IRS instructions).
- These records must be a separate line for each month.

Coverage File

BROWSE...

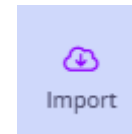
Or drop files here

36	File layout for the Springbrook coverage export format (comma delimited).
37	Related Employee Number
38	Month
39	Coverage Amount
40	Coverage Type Code
41	Safe Harbor Code

A	B	C	D	E
1	February	0	1A	2H
1	May	0	1A	2H
1	November	0	1A	2H
1	September	0	1A	2H
1	August	0	1A	2H
1	December	0	1A	2H
1	March	0	1A	2H
1	January	0	1A	2H
1	June	0	1A	2H
1	April	0	1A	2H
1	October	0	1A	2H
1	July	0	1A	2H

Import or Generate

- Generate is only available to existing Cloud Payroll customers. All others will use the Import process or manual entry.
- Employment Cutoff Date field is used to limit the employees included in the batch to only those that were employed AFTER the specified date.
- For example, if you are processing ACA reports for 2025, you would enter 01/01/2025 in this field to filter out employees that left the organization earlier. Can be left blank if you have included only the employees you want imported on the file.



Employee File

BROWSE... Or drop files here

Dependent File

BROWSE... Or drop files here

Coverage File

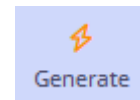
BROWSE... Or drop files here

Employment Cutoff Date

Sort Order
Employee Number

☐ Resubmission

Resubmission ID



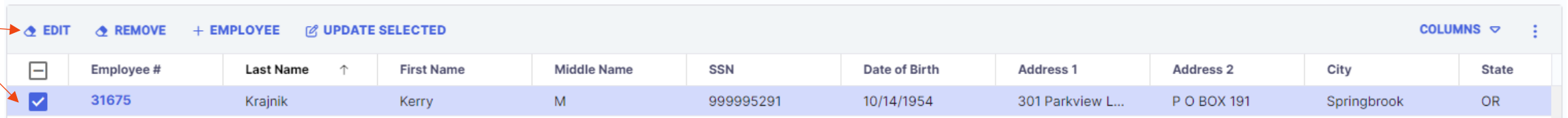
Calendar Year*
2025





Sort Order
Employee Number

☐ Self-insured coverage provided

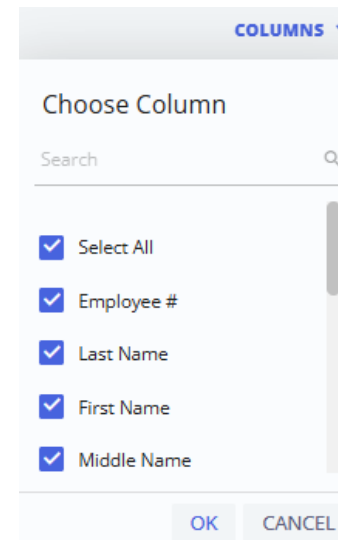
Edit Employees

- This window contains all the employee reporting information.
- Highlight the employee line or click in the left box and click the Edit to view information.




				UPDATE SELECTED	COLUMNS ▾					
	Employee #	Last Name ↑	First Name	Middle Name	SSN	Date of Birth	Address 1	Address 2	City	State
<input checked="" type="checkbox"/>	31675	Krajnik	Kerry	M	999995291	10/14/1954	301 Parkview L...	P O BOX 191	Springbrook	OR

- Click the Columns dropdown to adjust which columns you see in the grid.



COLUMNS ▾

Choose Column

Search 

- ☒ Select All
- ☒ Employee #
- ☒ Last Name
- ☒ First Name
- ☒ Middle Name

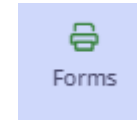
OK CANCEL

Edit Employer window

- Information on the Edit Employer window is only used for Electronic filing.
- If filing on paper (less than 10 forms), you can add the Contact info and save without additional information.
- This Edit Employer window will be discussed in the ACA Webinar on December 9th, 2025. You can register for this on our website
<https://springbrooksoftware.com/springbrook-training/>

FORMS

- Forms print in the order selected during the Import or Generate process.
- The forms print landscape on two double-sided pages per employee.



PDF

Name*	Springbrook
Federal Tax ID*	39-6005599
Address 1*	300 E Main Street
Address 2	
City*	Springbrook
State	OR
Zip*	53590-____
Phone	(503) 820-2200
Calendar Year	2025

Electronic Reporting

- Cannot electronically file until January 2026.
- If you have not previously filed electronically, or you are new to taking over this process, you need to get a TCC number from the IRS and test the TCC number.
 - Instructions in the Playbook.
<https://enterprisehelp.springbrooksoftware.com/a/1365167-affordable-care-act-tcc-testing-process>
 - TCC test files can be imported now if needed, these test files are provided in the Playbook on Community.


[SB Enterprise Help Center](#) / [Affordable Care Act Playbook](#) / [Affordable Care Act](#)


Affordable Care Act - TCC Testing Process

Updated on Dec 16, 2022

Updated November 17, 2021

1. You must wait 48 hours after receiving your TCC number to upload the testing file. You can complete the batch information during that period but do not export until the 48 hours is over.
2. Set up a new Affordable Care Act batch with a batch name of TCC Test (Generate a number - batch number is not critical, just trying to have a number that won't be confused with your live batch).
3. Use the Import process to import the Employee and Coverages files to the new batch. Do not open in Excel (notepad is ok) before importing. You can also manually key the values in the Edit Employee window.

 Employees - to test TCC.csv

 Coverages - to test TCC.csv

Go to [AIR](#) and scroll down to the Apply button if you do not already have a TCC

New filers

If you're a new filer, you must apply for an ACA Transmitter Control Code (TCC) before you can use AIR:

[Apply for an ACA TCC](#)

- Test files should be imported to a separate batch in Springbrook and must contain test information. You cannot test your TCC number using your live file/real information. Use the test info we provide in the Playbook.
- ACA TCC is different to 1099 TCC.
- Refer to the testing instructions in the [Affordable Care Act Playbook for information](#). <https://enterprisehelp.springbrooksoftware.com/a/1365167-affordable-care-act-tcc-testing-process>
- For new TCC users/new filers: It can take a couple weeks to get a TCC, test it, and have it moved from test to production status. This must happen before you file your live file.

Questions?





Thank you!