

Employer Maintenance: ACA Comply & Healthcare Plans

Monitoring Payroll Settings

Regularly monitor and then confirm that your employee statuses are correct in payroll. For example, verify that employees are accurately set to full-time, part-time, active, or terminated (with termination dates) in your payroll program. Lapses in employment of more than 120 days require termination dates/statuses be entered. Upon a rehire, a new hire/rehire date must be entered in order for tracking to be accurate.

Important! Do not drop employees from payroll for at least **2 years** after termination as their information is important to determine accurate ALE status and provide an audit history. This applies to both Paychoice and Encore platforms.

Important! For Encore customers, if an employee is rehired, termination dates **must** be removed from payroll. Active employees should **not** have a termination date.

Employer Steps in ACA Comply:

Once open enrolment begins, update the following areas in ACA Comply:

1. **Plan Builder.** Select **ACA Reporting > Reporting Data > Plan Builder**. Select appropriate Reporting Year. Create new plans for all major medical plans your company offers for the current reporting year, including non-calendar or calendar year plans. The following items are required when creating plans.
 - Plan name-**Hint:** Include year(s) in description as names must be unique each renewal year. i.e. 2017 BCBS for calendar year or 2016 & 2017 BCBS for a non-calendar year plan. Special characters are not allowed. **Please use letters and numbers only.**
 - Whether the plan meets **minimum essential coverage and minimum value requirements**. Must be answered yes or no.
 - Is plan self-funded? Only 'yes' for self-funded company setups.
 - Waiting period associated with plan (# of days) and if it starts on the first day of following month.
 - Tiers of coverage-who is offered this plan? **Employee Only** must be selected at minimum. Select ALL tiers that apply. Check with your advisor as to whether Conditional offers are included in your plan(s). Typical tiers-Employee only, Employee plus spouse, Employee plus dependents & Family Coverage. Hold Ctrl key & left-Click mouse on each to select multiple tiers.
 - Effective Date and Ending dates of plan, for example;
 - i. **Calendar Year Plan** i.e. 1/1/1X – 12/31/1X,
 - ii. or **Non-Calendar Year Plan** 7/1/17 – 6/30/18 or 7/1/18 – 6/30/19.
 - Monthly Cost for Employee contribution for self-only coverage-Enter in employee contribution box only, **not** in individual months. This amount is not based on payroll deductions per pay/month.

If any of these items are unfamiliar to you, please consult your benefits advisor for advice.

2. **Plan Assignment.** Select **ACA Reporting > Reporting Data > Plan Assignment.** Select appropriate Reporting Year. This feature can be used to assign multiple employees to plan(s) at one time. Use the filters and checkboxes to assign plans to eligible employees. According to IRS Regulations, any full-time or calculated full-time employees are eligible for health care insurance and must be offered. Make sure to include any Terminated employees who were covered in the reporting year as well.

- Select plans you want to assign to employee(s) by using check box(es).
- Expand the employee list to show all employees by increasing the page size in the bottom right corner of screen. **This screen always includes all employees in census, even if terminated in previous years.**
- Select employees from list who were eligible for the plans selected, and then click the green Assign Checked plans to Selected Employees button.
- If you make a mistake, you can use the same process to unassign a plan. Click on the red Remove Checked Plans from Selected Employees button instead.
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You can click on the List All Plan Assignments at any time at the top of the page to see the assignments given.

Assign Plans

List All Plan Assignments

Select Reporting Year: 2017

Plan Name	Sponsor	Renewal Date	Plan End Date
<input checked="" type="checkbox"/> 2017 Aetna	Aetna	01/01/2017	12/31/2017
<input checked="" type="checkbox"/> 2017 BCBS	BCBS	01/01/2017	12/31/2017
<input type="checkbox"/> 2017 Cobra	BCBS	01/01/2017	12/31/2017

List Type: All Employees

Assign Checked Plans to Selected Employees | Remove Checked Plans from Selected Employees

Employee Id	Employee Name	Hire Date	Term Date	Empl Status	Empl Type	Full Time Status	Pay Type	Home Department	Home Location
<input checked="" type="checkbox"/> 259354250	BOOTHBAY H MAINE	03/25/2004		ACTIVE	FULL TIME	Designated Full-Time	SALARY	800	0
<input type="checkbox"/> 258742300	BRIANNA BITZER	09/04/2015		ACTIVE	PART TIME	Calculated Non-Full-Time	HOURLY	4400	0
<input checked="" type="checkbox"/> 023478966	CHARLES KENTUCKY	12/16/2009		ACTIVE	FULL TIME	Designated Full-Time	HOURLY	600	0
<input checked="" type="checkbox"/> 259863545	DEBORAH D WISCONSIN	06/03/2008		ACTIVE	FULL TIME	Designated Full-Time	HOURLY	3900	0
<input type="checkbox"/> 052145690	DONALD ALASKA	01/01/2007		ACTIVE	PART TIME	Calculated Non-Full-Time	HOURLY	5400	0
<input checked="" type="checkbox"/> 06467935	DONNAL N NORTH DAKOTA	06/03/2008		ACTIVE	FULL TIME	Designated Full-Time	HOURLY	3000	0

****Hint:** You can use filters to minimize the number of employees in list.

- Use the Empl Status filter to show only active or terminated employees
- Use the Empl Type to show only full-time or part-time. When sorted on part-time, use the Full Time Status Filter and then choose calculated full-time.
- Use the Term Date Filter and choose type of 'greater than' and enter date of 12/31/1x. This will filter on only those who termed in the current reporting year, 201x.

3. **Offers of Coverage.** Select **ACA Reporting > Reporting Data > Offers of Coverage**

Choose appropriate reporting year. Offers will only be populated in this menu either by having used plan assignment or entering offers one at a time from this menu. You can complete Offers of Coverage in two ways, from within the program or by using the Export Template feature and then upload completed data through iSync. From Offers of Coverage in program:



- If you used Plan Assignment, the data will be populated here and then must be completed. You can then choose an employee from list in Offers of Coverage by clicking Edit to enter date for offers and outcomes. Appropriate outcomes of elected or waived **must** be chosen. If you have union employees, then the outcome of union would be selected. A separate Union plan would be built in plan builder to accommodate. (Special set up for Union-Please consult ACA Support)

Offers Of Coverage

ACA Comply.

The Offers of Coverage module allows Users to capture the offers of coverage that employers are making to employees. This information Users provide is directly related to Affordable Care Act information reporting and must be accurate. Employers must compile and input all offers of coverage data related to the applicable reporting year. This means that if an offer of coverage was made prior to the applicable reporting year, but that coverage carried over into the applicable reporting year, then it must be included in the data being provided by the employer. Example: Employee is offered coverage November 15, 2014 and elects to enroll in the coverage. The coverage effective date is January 1, 2015. This is included in the data. Example 2: Employee is offered coverage June 1, 2014, and elects to enroll in the coverage. Coverage is effective from July 1, 2014 through June 30th, 2015. This is included in the data. Employers that have insured plans will use the **Standard Template**, and employers that have self-insured plans will use the **Self-Insured Template**. Users can download the appropriate template, which will include a list of all employees for the applicable reporting year. They will then compile all missing data elements and upload the file through /Sync.



Export Standard Template Export Self-Insured Template

Employee Plans

Select Reporting Year: 2017

	Employee Name	SSN	Plan Name	Plan Renewal Date	Date Of Offer	Outcome Of Offer	Enroll Date	Disenroll Date
<input type="button" value="Edit"/>	BOOTHBAY H MAINE	569-35-4250	2017 BCBS	01/01/2017		Offered		
<input type="button" value="Edit"/>	BOOTHBAY H MAINE	569-35-4250	2017 Aetna	01/01/2017		Offered		

Manage Employee's Offer Of Coverage Data

Employee: **BOOTHBAY H MAINE**

Add a new offer to this employee: 2016 2017 Aetna 2530

Plan Name	Plan Renewal Date	Date Of Offer	Outcome	Enrollment Date	Disenrollment Date	
2017 Aetna	01/01/2017	<input type="text"/>	<input type="button" value="Offered"/> <input type="button" value="Elected"/> <input type="button" value="Offered"/> <input type="button" value="Union"/> <input type="button" value="Waived"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Remove"/>
2017 BCBS	01/01/2017	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="button" value="Remove"/>

- If you are creating the offers from this screen and did not use Plan Assignment, choose employee from dropdown list, choose the plan(s) and click the Create New Offer and complete the required information same as above.



If Exporting Offers of Coverage Template:

Select **ACA Reporting > Reporting Data > Offers of Coverage**. Select appropriate Reporting Year. Click the Export Standard Template for a Fully Insured Company or Export Self-Funded Template if you are self-funded.

Once exported into an Excel spreadsheet, enable editing if asked to do so. **You will again see all employees from your census file**. If you used Plan Assignment before exporting, you will now see employees with those plans assigned to them in the records in the exported file.

Any employee listed in the spreadsheet who does not have a plan name in their record, needs to be completed by entering the plan data or deleted because they were terminated or not eligible. Once you have deleted all unnecessary employees from the file, you can start entering plan data for remaining employees as listed above, including dates of offer, outcomes, enrollments and disenrollments.

When completed, save the file on your computer. See below for how to use the iSync feature to upload your data.

Offers of Coverage Hints:

- Each offer must be completed with Offer Date, Outcome of Offer and Enrollment Date when applicable. Disenrollment dates get entered only when an employee terminates or drops coverage.
- If an employee drops coverage and then re-enrolls later in the year, a new line item for the new offer of coverage can be created by clicking on the Edit button for that employee, and choosing a plan from that screen and Adding the new offer.

Please note when using an enrollment date other than the 1st of the month, the 1095C form will not show the employee having coverage until the next month. When a disenrollment occurs, if the date entered is not the 30th or the 31st of the month, the 1095C will not show the employee being covered for that month. It will report the previous month only.

Employer Maintenance: iSync Intelligent Import

The iSync Intelligent Import is used to update ACA Comply with Offers of Coverage. All other information is updated through the Sage Payroll Services integration. iSync is an optional feature and is only used if you are updating offers of coverage via a spreadsheet and not through the Offers of Coverage screen.

Important! The other templates and imports are for customers using standalone ACA Comply (without Sage Payroll Services). Using imports other than for **Offers of Coverage** will overwrite your company information in ACA Comply.

Using iSync Intelligent Import

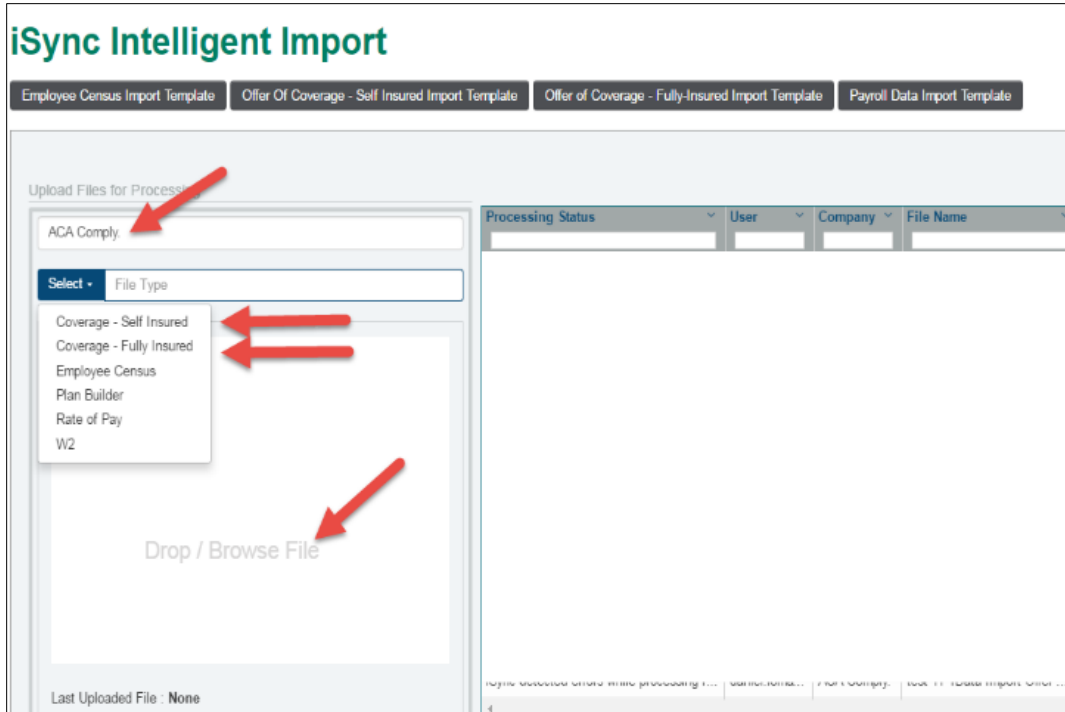
1. Export your Offers of Coverage from **ACA Reporting > Reporting Data > Offers of Coverage**. Export either the Standard or Self-Insured template that pertains to you and prepare the data in your file.

Note: All data and formatting in the report must be accurate and complete before you can successfully import it using iSync.

2. Select **iSync > Intelligent Import** to open iSync.

Tip: Export a blank template (Offers of Coverage) here for instructions to prepare the file.

3. Enter your company name.
4. Use the **Select** menu to choose the **File Type** to import. Choose only between:
 - Coverage – Self Insured
 - Coverage – Fully Insured
5. Click the **Drop/Browse File** area to choose the file you want to import.



6. Click the **Refresh** button at the upper-right corner of the table to refresh the Processing Status update for your imported file. Continue to click the refresh button until the Processing Status column shows 'iSync found no errors in the data' or if iSync detected errors. If errors are detected during the import, select the row, then click the **Open Details** button (upper-right corner of the table) to view the errors. Correct your file before trying the import again.



Important! In order for iSync to upload any of the data, it must not contain **any** errors in the data file. Data will not be uploaded if there are errors.

Employer Maintenance: ACA Tracking

Use the icons below to track your employee ACA measurement period information and activity so you can determine healthcare eligibility. This has replaced the Standard Report and the Historical Audit Report.

Tip: We recommend you review this data each month.

Select **ACA Tracking > ACA Tracking Home >**

ACA Tracking



All Employees



All Tracked Employees



Measured Employees Report



Designated Full Time



Measurement Data Archive

All Employees

This is employee demographic information that comes from payroll. It is the same as the Employee census information. This is read-only information. Changes to employee payroll info needs to be made in payroll platform only.

All Tracked Employees

This report shows current, in progress measurement period data. These are employees currently being tracked with potential ACA Status. There are no designated full-time employees shown here. Use this report to determine employee eligibility for health care. Calculated Full Time Employees (averaged 30 or more hours per week during measurement) must be offered health insurance when they complete their measurement period.

Measured Employees Report

This report shows the most recently completed measurement period data. It will show the final ACA status of employee in a completed measurement period. It will also show the dates of the Measurement, Administrative, and Stability period.

******Employees in a stability period who have health insurance should not be dropped from coverage until stability period ends** i.e changing status from full-time to part time does not mean insurance gets immediately dropped by employer. Refer to Measured Employees Report for dates of stability period.**



Designated Full Time

This report displays all employees who were set up with a full-time status in payroll

Measured Data Archive

This report shows details for each employee for every measurement period completed since hire date. This report shows both tracked employees and designated full-time employees.

Print Send To Excel

This report shows employees in current measurements.

Refer to this column to see when measurement periods are ending to determine eligibil, this can be sorted by date

Employee Location	Employee Department	Employment State	Residence State	ID	Employee Name	Employment Type	Tracked Projected Status	Employment Date	Average Weekly Hours	Maximum Average Weekly Hours to Maintain Non-Full-Time Status	Measurement Type	Measurement Start Date	Measurement End Date	Current Period
00	1000	FL	FL	837593755	STEVEN TYLER	HOURLY	Calculated Full-Time Calculated Non-Full-Time	10/16	32.18	28.15	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	775624097	JOHN OATS	HOURLY	Part time employees who averaged 30 or more hours after measurement ends are considered Calculated FT and benefit eligible		32.18	28.15	Ongoing Salary	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456838	JOY DARLING	HOURLY			30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456836	CASSIDY DEESON	HOURLY	Calculated Full-Time	4/21/2013	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456835	TOM HANKS	HOURLY	Calculated Full-Time	4/20/2013	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456834	NANCY WILSON	HOURLY	Calculated Full-Time	4/19/2013	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456833	CHRISTOPHER COLUMBUS	HOURLY	Calculated Full-Time	2/17/2011	46.36	24.37	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456832	SAMUEL JACKSON	HOURLY	Calculated Full-Time	2/16/2011	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456831	TIM MCGEE	HOURLY	Calculated Full-Time	2/15/2011	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456830	LEROY GIBBS	HOURLY	Calculated Full-Time	2/14/2011	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456828	CHANDLER JORDAN	HOURLY	Calculated Full-Time	2/12/2011	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456827	KAYLA OLIVE	HOURLY	Calculated Full-Time	2/11/2011	30.55	28.59	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456825	LINDA STILLIS	HOURLY	Calculated Full-Time	2/9/2011	30.00	28.73	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period
00	1000	FL	FL	123456824	JUSTIN ROWLAND	HOURLY	Calculated Non-Full-Time	2/8/2011	26.18	29.75	Ongoing Hourly	10/1/2017	9/30/2018	Measurement Period

Plan Builder

Enter the name of the plan being offered. The plan name MUST be unique.

Enter the name of the Carrier or Plan Sponsor

Does this plan meet minimum essential coverage requirements?

Does this plan meet minimum value requirements?

Is this self-funded coverage?

Must be answered yes or no

Only yes if self-funded

Enter the Waiting Period guidelines associated with this plan. This information is directly related to IRS reporting and must be accurately entered in the Plan Builder.

Waiting Period Type: Waiting Period: Waiting Period Begins on Following Calendar Month:

- Select all the tiers of coverage that are being offered within the plan. The tiers of coverage that are offered are directly related to IRS reporting and must be accurately entered in the Plan Builder.
- Employee Only
 - Employee Plus Conditional Offer to Spouse
 - Employee Plus Dependent
 - Employee Plus Dependents and Conditional Offer to Spouse
 - Employee Plus Spouse
 - Family Coverage

This is an open field where you can enter any eligibility requirements that are associated with the plan.

Enter the date that the plan renews or becomes effective.

Enter the date the plan ends.

Enter the total annual cost of the self-only coverage which includes both the employer and employee contribution.

If the required employee contribution for self-only coverage is

Enter the monthly cost here, not the amount deducted per month/check.

Enter the required employee contribution for self-only coverage for each of the following months

Jan	Feb	Mar	Apr	May	Jun
<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Jul	Aug	Sep	Oct	Nov	Dec
<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>

only use if plan amount cost changes each month, not typical

Save



Measured Employees Report -

Print Send To Excel

Employee Id	Employee Name	Current ACA Status	Measurement Period Start Date	Measurement Period End Date	Admin Period Start Date	Admin Period End Date	Stability Period Start Date	Stability Period End Date	Avg Weekly Hours	Date of Hire	Total Hours Worked in MP	Total Weeks Worked in MP
xxx-xx-xxxx	Jane Doe	Calculated Full-Time	09/01/2016	08/31/2017	09/01/2017	09/30/2017	10/01/2017	09/30/2018	32.18	4/1/16	1673.25	52

Part-time employee who measured more than 30 hrs/week during measurement

an employee enrolled in insurance on 10/1/17 would remain covered until 9/30/18, unless employee drops or terms.