



ACA Manager 2021 Year End Guide & Pre-Processing Checklist



GUIDE PREPARED BY WURK:

2162 Market Street
Denver, CO 80205

Need to connect with Customer Success? Call us at 720-707-1676

OVERVIEW

Dear Valued Client,

Thank you for your partnership with Wurk in 2021. We appreciate your business and recognize there were many challenges that businesses faced this year. As we approach the end of the year, we would like to ensure that your organization is optimally equipped with the information you need to close out the year on a high note. In this packet, we've included:

- [Key Dates for ACA Year-End Processing](#)
- [ACA Year-End Communication Methods](#)
- [ACA Year-End Resources](#)
- [ACA Pre-Processing Checklist](#)

Enclosed is our 2021 ACA Year-End Guide. & Pre-Processing Checklist Please take the necessary time to review the details in the guide for important information and reminders regarding year-end processing.

In our effort to make your year-end process more efficient by getting your employees' 1095-Cs in their hands faster, we will be mailing the documents to your employees' homes via US Mail. The documents will be sent to active and terminated employees. Despite our Rate Card charge of \$5/item for printing and delivery of 1095-Cs, we will not assess these charges this year. Active employees will also be able to view their 1095-C via Wurk once they are released during ACA Year-End Processing.

Sincerely,
The Würk Team

KEY DATES FOR ACA YEAR-END PROCESSING

Item	Description	Ref.	Owner	Due Date
ACA Support Ticket Opened	ACA Support Ticket to direct your ACA Year-End Processing Questions	p.4	Wurk	12/6/21
Client Completes Year-End Pre-Processing Checklist	This will be provided via the ACA Support ticket. Client review of ACA settings and Employee details to ensure Year End Processing is completed in an accurate and timely manner.	p.5	Client	12/13/21-12/31/21
ACA Year-End Webinar	Wurk review the steps to complete ACA processing.	p.4	Wurk	12/17/21
ACA Office Hours	Open forum for Q&A on ACA Processing w/opportunity for breakout sessions for 1:1 questions	p.4	Wurk	1/5/22, 1/12/22, 1/19/22
Client Completes Year-End Processing in Wurk	ACA processing completed for each EIN by Client.	n/a	Client	1/3/22 – 1/20/22*
ACA Files Pulled for Filing 1094-C & Mailing 1095-C	Wurk team will pull all ACA files and reach out to clients if any errors are received.	n/a	Wurk & Client	1/21/22 - 1/31/22
IRS Errors Returned from Filing	Wurk team to provide client with any errors resulting for IRS filing submission for them to review and correct.	n/a	Wurk & Client	2/1/22-2/28/22

*Note: Wurk guarantees ACA filings to be compliant with filing deadlines if this date is met, after this date, Wurk cannot provide a guarantee. If you are unable to meet these deadlines you will be subject to all associated IRS or State late filing/ mailing fees.

FILING & MAILING DEADLINES

Federal 1095-Cs Mailed to Employees	1/31/2022** Deadline
Rhode Island State Filing	1/31/2022 Forms Mailed & Filing Deadline
California State Filing	1/31/2022 Forms Mailed 3/31/2022 Filing Deadline
Washington DC State Filing	1/31/2022 Forms Mailed 4/30/2022 Filing Deadline
New Jersey State Filing	3/31/2022 Forms Mailed & Filing Deadline
Federal 1094-C Filing for all EINs	3/31/2022 Deadline

**IRS proposed extension to 3/2/2022 but Wurk will be managing to 1/31/2022 deadline

ACA YEAR-END COMMUNICATION METHODS:

- **Support Tickets:** An “ACA Year End” Support Ticket will be opened on your behalf and assigned to our ACA Task Force. All ACA related questions are to be asked/replied to via this support ticket to keep communication centralized. We’ll also be pushing out communications on error resolution through these tickets.
- **ACA Year-End Prompts in WurkConnect:** WurkConnect will have interactive links that will take you directly to the associated reporting screen. There will also be checkboxes for you to select when tasks have been completed to allow you to track your last completed step in the checklist as well as the percentage for the overall checklist completion.
- **ACA Year-End Processing Webinar:** Our ACA Task Force will be reviewing the steps that will need to be taken in Wurk by the deadline to ensure that timely filing and mailing of 1094-Cs & 1095-Cs.
- **ACA Office Hours:** There will be at least three Office Hours sessions in January for you to join and ask questions to our ACA Task Force team. If there are sensitive questions, there may be opportunities to break out into 1:1 sessions to diagnose specific issues. Otherwise, these should be communicated via the Support Ticket.

ACA Year-End Resources:

To assist you with this part of the process, we have the following resources for you:

Resource	When to Use
ACA Year-End Pre-Processing Checklist (p.5-21)	Prior to Year-End Processing (this can be completed
ACA Reports Guide	Prior to as an audit tool and during Year-End Processing
ACA 1095-C Codes Guide	Prior to as an audit tool and during Year-End Processing, while you are reviewing 1095-Cs.
ACA Year-End Processing Steps	During Year-End Processing
ACA Processing FAQs & Troubleshooting Guide	During Year-End Processing

ACA YEAR-END PRE-PROCESSING CHECKLIST

The first required filings of the Affordable Care Act (ACA) forms in 2015 generated a variety of product enhancements surrounding ACA requirements. Since then, there have been many updates made to ACA reporting requirements, the WurkACA Manager solution, and IRS policy as well. Following the steps listed in the checklists that follow will help ensure that you have laid the groundwork for the most accurate ACA reporting.

The following checklist will guide you through the steps to audit ACA specific employee data and ACA setting in Wurk. Ensuring this information is up to date **prior to** starting the ACA Year-End Process is critical to ensure accurate reporting and to avoid any IRS late filing or correction fees. Please reach out to Support via your ACA ticket for any questions or setup adjustments.

Checklist Contents:

- [Employee Information](#)
 - [Benefit Profile](#)
 - [Benefit Profile Effective Date](#)
 - [Benefit Enrollment Override](#)
 - [ACA Profile](#)
 - [Active & Terminated COBRA enrollments \(Self-Insured Plans Only\)](#)
 - [Employee Status Change History](#)
 - [Employee Benefit Plans](#)
 - [Dependent Enrollments \(Self-Insured Plans Only\)](#)
 - [Dependent Demographics \(Self-Insured Plans Only\)](#)
- [ACA Manager Calculations](#)
 - [Earning Codes vs. Timesheets](#)
 - [ACA Timeline](#)
- [ACA Settings](#)
 - [ACA Form Contact Name & Phone](#)
 - [ALE List](#)
- [Benefit Plans](#)
 - [Coverage Provided through End of Termination Month](#)
 - [Plan is Self-Insured](#)
- [Benefit Profiles](#)
- [Reporting that can assist with Audit Process](#)
 - [Employee ACA](#)
 - [ACA Data Detailed](#)
 - [ACA Data Summary](#)
 - [ACA 1094-C Employee Count](#)

EMPLOYEE INFORMATION

My Team > Employee Information

ACA Manager will look to certain information in the employee's record.

Profiles	Completed?
<p>Benefit Profile</p> <p>The Benefit Profile assigned to the employee will direct ACA Manager to the appropriate plan when determining which plan should be used for ACA reporting. For example, if your company offers three medical plans, but the Benefit Profile assigned to the employee only includes two, the ACA Manager will not consider the plan not included in the Benefit Profile when evaluating the employee.</p> <p>Ensure every employee who is eligible for benefits has a “Benefit Eligible” Profile attached.</p> <p>Note: Clients with Union employees will have a specific “Union” Benefit Profile for this population with a place holder medical plan to populate the correct codes for the 1095-C timeline. If you need this added to your setup, please reach out to Support via your ACA ticket.</p> <p>Benefit Profile Effective Date</p> <p>The Effective Date of the “Benefit Eligible” Benefit Profile (or equivalent profile containing medical benefit plans) determines the month the employee is eligible to begin medical coverage, which will be reflected on the employee's ACA Timeline, including populating the associated code on their 1095-C. This tells the system when the Benefit Profile should be applied to the employee. Be mindful of this date, because if it falls prior to the actual date that the employee was truly eligible for benefits, this may affect ACA reporting.</p> <p>Examples:</p> <p> Important: If a new hire/re-hire's Benefit Profile Effective Date is prior to the actual date the employee is first eligible to begin medical coverage (i.e. 12/31/1900 for current year new & re-hires/benefit eligible employees, or a date within their Waiting Period), this will negatively impact ACA calculations.</p> <p>Ensure every employee who is eligible for medical benefits has a “Benefit Eligible” (or equivalent) Profile reflecting the correct Effective Date.</p> <p>Tip: Starting from the <i>Employee Information</i> report, add the “Benefit Profile (Effective Date From)” and “Current Benefit Profile (Effective)” columns.</p> <p>Note: This column will only display the current Benefit Profile assigned, not future dated Benefit Profile assignments.</p> <p>Examples:</p> <p>(1) Find out if someone has a Benefit Profile assigned prior to their hire date (ex. 12/31/1900); find out if someone has a Benefit Profile aligned with the hire date but there is a 30-day waiting period</p>	<input data-bbox="1401 480 1438 516" type="checkbox"/>

(2) An employee with a Hire Date of 10/21/2020 will be eligible to begin their medical benefits on 12/1/2020 (the 1st of the month following 30 days from hire). Below is how the “Benefit Eligible” Benefit Profile must be dated for the ACA Manager to reflect the correct codes on the 1095-C.

Hired *

10/21/2020 

Benefit

Benefit

Choose... 

Effective Date *

12/31/1900 



Benefit *

Benefit Eligible 

Effective Date *

12/01/2020 

As previously mentioned, the “Current Benefit Profile (Effective)” column will **only** display the current Benefit Profile assigned, **not** future dated Benefit Profile assignments.

First Name	Last Name	Current Benefit Profile (Effective)	Benefit Profile (Effective Date From)
Test Benefits	Employee		12/31/1900

Benefit Profile Enrollment Override

Completing the Benefit Profile Enrollment Override widget allows the employee to access the “Enrollment” link in their hamburger menu under My Info (single person icon) > My Benefits prior to the date they are eligible to begin medical coverage, without negatively impacting ACA calculations.



Example: Continuing the example from above, the “Benefit Eligible” (or equivalent) Benefit Profile selected in the *Override* widget should match the employee’s Benefit Profile assignment, the *Start Date* is to match the employee’s Hire Date (10/21/2020), and the End Date is to match the Benefit Profile Effective Date (12/1/2020).

Effective dating the Override widget for the span of time they are in their Waiting Period allows them to access the benefit “Enrollment” link from 10/21/2020 – 12/1/2020, not negatively impacting ACA reporting and calculations.

Benefit Profile Enrollment Override

Profile: Benefit Eligible  Start Date: 10/21/2020  End Date: 12/01/2020 

Note: If additional settings are configured within the Benefit Profiles to limit the number of days a New Hire has to enroll in benefits (i.e. 45 days from Hire Date), their access to the benefit “Enrollment” link would **only** be available up until this timeframe.

LAST DAY NEW EMPLOYEE CAN ENROLL

45 Day(s) From Date Re-Hired

Use Date Hired If Employee Missing Above Date

Adjusted To Immediately After



Important: If an employee has a future dated “Benefit Eligible” (or equivalent) Benefit Profile, and the *Benefit Enrollment Override* widget is not filled in/not completed properly, they will **not** be able to enroll in benefit plans until the effective date of their Benefit Profile.

ACA Profile

The ACA Profiles are assigned on a per-employee basis and tell the system everything it needs to know about measuring and reporting for each employee – whether hours need to be measured or not, where to look for the hours, what qualifies as ACA Full Time, what qualifies as affordable for that year, etc. The ACA Profile includes rules that control how the ACA Manager calculates the employee’s ACA Timeline and 1095-C.



Ensure that every employee has the correct ACA Profile assigned.

Tip: Starting from the *Employee Information* report, add the “Current ACA Profile (Effective)” column.



Important: If an employee changed from/to Hourly, Salary, or Non-Employee (i.e. **Test Employees, Contractors, Benefit Brokers, Not in Payroll, etc. that should not be reflected on the Form 1094-C**), the correct ACA Profile must be assigned and properly effective dated to reflect the change(s). There is no need to effective date the ACA profile for new hires, the profile assignment will auto populate a date. The only time you need to effective date the ACA profile is if an employee is moving from one ACA profile to another, in which case you would effectively date that status change.

Active & Terminated Employee COBRA Enrollments

Only complete if medical plans are Self-Insured

If an employee is enrolled in a self-insured COBRA medical plan as an Active or Terminated Employee, even if they did not work in the filing year, you’ll add a corresponding “COBRA” ACA profile to their record. This should be assigned and effective dated the first of the month they were eligible to receive COBRA for that year.

ACA Profile

ACA Profile

Full-Time/Non-Variable

Effective Date *

01/01/2012

ACA Profile

COBRA

Effective Date *

03/01/2021

+ Add

Employee Status Change History Widget

This widget stores all of the employee's action dates (hired, terminated, and re-hired), and the system looks to this when determining which codes to use on Form 1095-C.

Employees Status Change History

Page 1 of 1 1 - 3 of 3 Rows

Status	Date
Rehired	07/26/2021
Terminated	06/21/2021
Hired	05/19/2020

If there are any questions regarding break in service calculations, please refer to this widget first. If the employee has any of the following, manual corrections will be needed:

- Two consecutive re-hire dates without a termination date between the two
- Two consecutive termination dates without a re-hire date between the two
- A re-hire date without any corresponding termination date prior

Employees Status Change History

Page 1 of 1 1 - 5 of 5 Rows

Status	Date
Rehired	11/08/2021
Terminated	05/02/2021
Other	12/28/2020
Hired	01/15/2020
Rehired	

Benefits

Completed?

Employee Benefit Plans

The ACA Manager references the **medical benefit plans** to determine if the employee is enrolled, and if the plan provides minimum essential coverage and minimum value.



Ensure all employees who had an Active status in the current year and elected medical coverage are enrolled in a medical benefit plan, and their “Coverage Effective From”/“Coverage Effective To” dates are accurate.

Tip: Starting from My Employees > Employee HR Maintenance > Benefits > *Benefit Plans*, add the “Coverage Effective From” and “Coverage Effective To” columns.



Important: The ACA Manager **will not read standalone medical deductions** as enrollment to a medical benefit plan. Employees **must** be enrolled in a medical benefit plan for ACA reporting and 1095-C coding to be accurate.

Dependent Enrollments

Only complete if medical plans are Self-Insured



If an employee is enrolled in a self-insured medical plan, Part III of Form 1095-C must be populated to identify who was enrolled and for which months. This identification includes the employee and anyone else covered under their plan.

If you have self-insured medical plans, ensure that the “Coverage Effective From” and “Coverage Effective To” dates are reflecting accurately for all enrolled in the employees plan for the current year.

Tip: Review the *Dependents* report found under My Employees > Employee HR Maintenance > *Benefits*.

Dependent Demographics

Only complete if medical plans are Self-Insured



Part III of Form 1095-C requires a name as well as either a Social Security number (preferred) or date of birth (only to be populated if the SSN is not available) for every individual enrolled in the employee’s plan.

If you have self-insured medical plans, ensure that Social Security numbers and birthdates are reflecting accurately for all enrolled in the employee’s plan for the current year.

Tip: Starting from My Team > Benefits > *Dependents* and add the “Dependent Birthday” and “Dependent SS#” columns.

ACA MANAGER CALCULATIONS

ACA Hours Worked	Completed?																								
<p>ACA Earning Codes vs. Timesheet Hours</p> <p>The ACA Manager uses the hours associated with pre-selected earning codes or timesheet hours to calculate the hours worked by employees each month, which are populated into their ACA Timeline.</p> <p>If you are utilizing Earning Codes, verify and update (if needed) the ACA Earnings list, ensuring it includes all earning codes that should be associated with “hours worked”.</p> <p>Note: Earnings Codes used within the reporting year should remain on the ACA Earnings list even if they are no longer be utilized moving forward (ex. COVID).</p> <p>Information regarding what qualifies as an <i>Hour of Service</i> under the Affordable Care Act can be found on the IRS Website.</p> <p>Instructions: Follow the steps below to access, view, and edit (if applicable) the <i>ACA Earnings</i> list. If any other changes are needed outside of this <i>ACA Earnings</i> list, reply to the <i>ACA Processing 2021</i> Support ticket that was created on your behalf with details of the changes.</p> <ol style="list-style-type: none"> Navigate to the Admin link (gear) > Company Settings > Profiles/Policies > ACA (Affordable Care Act). Click the pencil next to the applicable ACA Profiles (ex. <i>Full-time (Non-Variable)</i> or <i>Part-Time (Variable)</i> ACA Profile). <p>← ACA Profiles</p> <div data-bbox="233 1234 657 1650"> <p>Rows On Page: 20 ▾ 6 Rows Refresh</p> <table border="1"> <thead> <tr> <th colspan="3">Name</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>= ▾</td> </tr> <tr> <td></td> <td>X</td> <td> COBRA</td> </tr> <tr> <td></td> <td>X</td> <td> Full-Time/Non-Variable</td> </tr> <tr> <td></td> <td>X</td> <td> Non-Employee</td> </tr> <tr> <td></td> <td>X</td> <td> Part-Time/Variable</td> </tr> <tr> <td></td> <td>X</td> <td> Union Full-Time/Non-Variable</td> </tr> <tr> <td></td> <td>X</td> <td> Union Part-Time/Variable</td> </tr> </tbody> </table> </div> <ol style="list-style-type: none"> Click the pencil next to the <i>Calculate Monthly Hours from Payroll</i> rule. <div data-bbox="217 1782 597 1906"> <p> Calculate Monthly Hours From Payroll</p> <p>PST Type List: ?</p> <p>PST Earning List: ACA Earnings List</p> <p>Hours Calculated From: September 2021</p> </div>	Name					= ▾		X	COBRA		X	Full-Time/Non-Variable		X	Non-Employee		X	Part-Time/Variable		X	Union Full-Time/Non-Variable		X	Union Part-Time/Variable	<div data-bbox="1414 380 1455 422"> <input type="checkbox"/> </div>
Name																									
		= ▾																							
	X	COBRA																							
	X	Full-Time/Non-Variable																							
	X	Non-Employee																							
	X	Part-Time/Variable																							
	X	Union Full-Time/Non-Variable																							
	X	Union Part-Time/Variable																							

- Click the link to the right of the PST Earning List field

Calculate Monthly Hours From Payroll

Effective From To

Full Time Minimum Hours

Recalculate Last Months

PST Type List

PST Earning List

- Click the pencil next to the ACA Earnings list.

Earnings Lists

Rows On Page

	Name
	=
	ACA Earnings

- All Earning Codes included are listed on the left; those not part of the list are on the right. Delate any codes off the list by clicking the “x” and add any codes by clicking the “+”. When finished, click “Done”, and the list will be updated. You may “X” out of the pop-up boxes since the list has already been updated and there are not any configuration changes being made to the actual ACA Profile.

Edit List: ACA Earnings X

List Items		Items Not In A List	
Rows On Page	11 Rows	Rows On Page	22 Rows
<input type="checkbox"/>	Name	<input type="checkbox"/>	Name
<input type="checkbox"/>	=	<input type="checkbox"/>	=
<input type="checkbox"/>	Bereavement	<input type="checkbox"/>	1099
<input type="checkbox"/>	Double Time	<input type="checkbox"/>	Bonus
<input type="button" value="Remove"/>		<input type="button" value="Add"/>	

ACA Timeline

The ACA Timeline tracks employee ACA information per month to show where employees stand in their current measurement period, active compliance alerts, and 1095-C codes for lines 14-16.

Ensure hours are populating into the ACA Timeline.

Tip: Review the *ACA Data Detailed* report under My Team > Benefits > ACA. This report will default to show data for last month; update the dates by clicking the “Dates” pillbox at the top right.

Note: Employee hours are automatically recalculated on a frequency pre-configured in their ACA Profile (generally the 7th or 14th of each month). If hours have not updated for the prior month, manual recalculation can be executed.



Important: If updates were made to the ACA Earnings list, recalculate employees *prior* to verifying hours are populating into the ACA Timeline so that ACA calculations are up to date.

Instructions: Follow the steps below to manually recalculate employees’ ACA Timeline.



Recalculating employees may take up to 45 minutes depending on the number of employees being calculated. Filter down the number of employees to recalculate by EIN, Pay Type, or Account Status to recalculate smaller groups of, lessening the recalculation time.

1. Navigate to My Team > Benefits > ACA > Employee ACA Actions
2. Filter as needed, but do not exclude employees who were terminated in the current year.
3. Select the checkboxes of the employees to recalculate, then click “Recalculate”.

← Employee ACA Actions RECALCULATE

Page 1 of 5 1 - 20 of 96 Rows Saved: Employee ACA (custom) ▼

<input type="checkbox"/>		Employee Id ▼	Username ▼	First Name ▼	↑ Last Na
		starts with ▼	= ▼	starts with ▼	starts wit
<input checked="" type="checkbox"/>		1000	Test_Account	Test	Accoun
<input checked="" type="checkbox"/>		0001	Testadmin	Test	Admin

When prompted to make a selection, select the current year, then click “Recalculate”

Recalculate ACA Timeline
✕

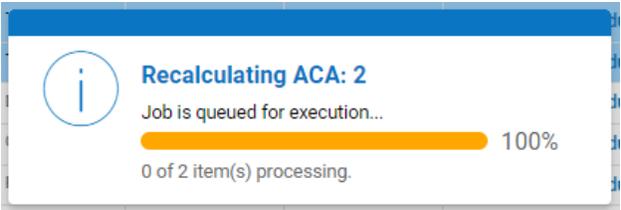
Pressing Recalculate will recalculate the selected employee(s) ACA Timeline for the current year, the previous year and the next year automatically. You may also recalculate further back by selecting the desired year from the drop down.

Recalculate From

2020
▼

CANCEL
RECALCULATE

A pop-up progress bar and percentage completed will display to until all have been recalculated.



ACA SETTINGS

Settings	Completed?
<p style="color: #4F81BD; margin-top: 0;">ACA Form Contact Name & Phone</p> <p>The name & phone number entered here will be used on Form 1094-C for the selected Employee Identification Number (EIN) and will appear on all Forms 1095-C for the selected EIN as well. In order to review your company’s ACA Settings, navigate to Admin > Company Settings > Global Setup > Company Setup > HR or ACA tab.</p> <p style="color: #C00000; margin-top: 20px;">Ensure the Contact Name and Phone Number fields are up to date for each EIN and does not include dashes.</p>	<input style="width: 20px; height: 20px; border: 1px solid #ccc;" type="checkbox"/>

← Company Setup

Company EIN MGH

Company Info

Company Config

Login Config

Global Policies

Defaults

Payroll

HR

ACA

ACA Settings

Default ACA Profile

01/01/2012

Company Qualifies for Qualifying Offer Transition Relief for 2015

No

ACA Form Contact Name John Smith

ACA Form Contact Phone 8188881212

Applicable Large Employer List

Applicable Large Employer list or ALE list apply to multi-EIN organizations and allow an EIN to be linked to the other EINs within that multi-EIN organization that are part of the Aggregated ALE Group for the purposes of filing the Form 1094-C and ensuring Forms 1095-C are completed accurately. This also impacts which EINs will populate on Part III of the 1094-C. In order to review your company's ALE list, navigate to Admin > Company Settings > Global Setup > Company Setup > HR or ACA tab.

You'll click on the ALE list link and make any appropriate adjustments. Or add a "New List" by clicking on the "New List" button.

Part of the Following ACA ALE Group

List Name
 ALE List

NEW LIST

COBRA Reporting for Self-Insured

Only complete if medical plans are Self-Insured

If you have a self-insured healthcare plan and have employees or former dependents enrolled in their own COBRA policy, check this box to enable the Form 1095-C Dependent functionality. In order to review your company's ACA Settings, navigate to Admin > Company Settings > Global Setup > Company Setup > HR or ACA tab.

ACA Settings

Default ACA Profile  01/01/2012 

Company Qualifies for Qualifying Offer Transition Relief for 2015

ACA Form Contact Name

ACA Form Contact Phone

Enable COBRA reporting for self-insured health plan

BENEFIT (MEDICAL) PLANS

Company Settings > Profiles/Policies > Benefits > Plans

It is important to ensure that all your medical plans are properly set up in Wurk because the ACA Manager product module must reference the correct plans when evaluating each employee.

Coverage Provided Through End of Term Month

Completed?

Checking this box indicates that if an employee should term prior to the end of the month, the offer of coverage and enrollment (if the employee is enrolled in the plan) will extend to the end of the termination month.*

← Edit Plan

Benefit Plan

Benefit Type

Name*

Description

Active

Certificate #

Policy #

Effective From* **To**

Eligibility Filter 

ACA Eligibility Filter 

COBRA Eligible

Coverage Provided through End of Term Month

**If you need to have this setting changed, please reach out to Support via your ACA ticket at your earliest convenience, as this may affect ACA and Payroll.*

Plan is Self-Insured

Completed?

Only complete if medical plans are Self-Insured

If a particular healthcare plan is self-insured, Part III of Form 1095-C will need to be populated for each employee, identifying who was enrolled and when they were enrolled.

Checking this box is necessary if the plan selected is self-insured (this can be confirmed with your benefit carrier/provider) and ensure that the effective dates on the plan are correct.*

If none of your plans are self-insured, no action is required with this step.

← Edit Plan

Benefit Plan

Benefit Type: Medical

Name*: Simple EE

Description:

Active:

Certificate #:

Policy #:

Effective From*: 01/01/2016 To 12/31/9999

Eligibility Filter: All Accounts

ACA Eligibility Filter: All Accounts

COBRA Eligible:

Coverage Provided through End of Term Month:

Plan Is Self-insured:

**If you need to have this setting changed, please reach out to Support via your ACA ticket at your earliest convenience, as this may affect ACA.*

BENEFIT PROFILES

Company Settings > Profiles/Policies > Benefits > Profiles

Ensure that each Benefit Profile lists the appropriate healthcare plans.

ACA Manager will only look at the healthcare plans attached to a particular Benefit Profile assigned to the employee.

Benefit Profiles	Completed?																				
<div data-bbox="138 598 1101 1136"> <p>Medical</p> <p>Brief Explanation [View/Edit Brief Explanation]</p> <p>Auto Add <input type="checkbox"/></p> <p>Use Waived Reason <input type="checkbox"/></p> <p>Employee Can Select Up To <input type="text" value="1"/> Plan(s), At Least <input type="text" value="0"/> Plan(s) Should Be Selected</p> <p>Show On Life Change Event <input checked="" type="checkbox"/> New Employee <input checked="" type="checkbox"/></p> <table border="1"> <thead> <tr> <th></th> <th>PLAN NAME</th> <th>EFFECTIVE FROM</th> <th>EFFECTIVE TO</th> <th>EARNING/DEDUCTION</th> </tr> </thead> <tbody> <tr> <td></td> <td> Age Banded</td> <td>01/01/2015</td> <td>12/31/9999</td> <td>HS Medical</td> </tr> <tr> <td></td> <td> MVP Plan</td> <td>01/01/2015</td> <td>12/31/9999</td> <td>HS Medical</td> </tr> <tr> <td></td> <td> PPO</td> <td>01/01/2015</td> <td>12/31/9999</td> <td>HS Medical</td> </tr> </tbody> </table> </div> <p><i>*If you need to have this setting changed, please reach out to Support via your ACA ticket at your earliest convenience, as this may affect ACA.</i></p>		PLAN NAME	EFFECTIVE FROM	EFFECTIVE TO	EARNING/DEDUCTION		Age Banded	01/01/2015	12/31/9999	HS Medical		MVP Plan	01/01/2015	12/31/9999	HS Medical		PPO	01/01/2015	12/31/9999	HS Medical	<input type="checkbox"/>
	PLAN NAME	EFFECTIVE FROM	EFFECTIVE TO	EARNING/DEDUCTION																	
	Age Banded	01/01/2015	12/31/9999	HS Medical																	
	MVP Plan	01/01/2015	12/31/9999	HS Medical																	
	PPO	01/01/2015	12/31/9999	HS Medical																	

REPORTING THAT CAN ASSIST IN THE AUDIT PROCESS

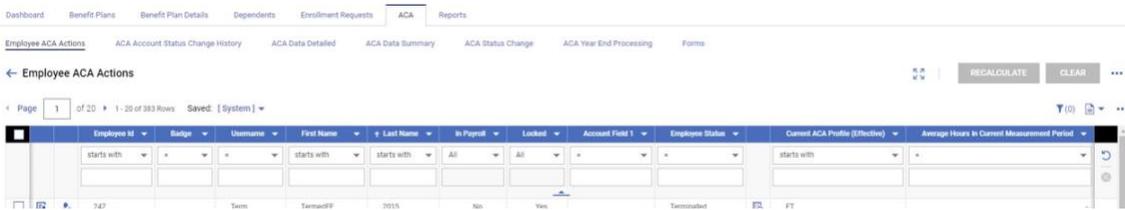
Team > Benefits > ACA

Each of these system reports can be accessed depending on the security profile assigned to the user. If you cannot see one of these reports, please reach out to Support via the ACA ticket.

Note: All Employees, regardless of ACA Profile assignment, will show on reports unless filtered out.

Employee ACA Actions

This report gives you the opportunity to mass recalculate, clear an ACA Timeline if needed, and import historic data. **Navigate here to become familiar with the Recalculate function (steps listed above on pages 12-13)**



Completed?

ACA Data Detailed

This report will give you a month-by-month report of data from the ACA timeline. You can review timeline details and codes ahead of Year End Processing to ensure 1095-Cs populate as intended.

Tip: This report will default to show data for last month; update the dates by clicking the “Dates” pillbox at the top right.

To review some coding combinations that you are not expecting, adjust the report so that you are only left with the columns for Lines 14, 15, 16:

- Line 14 = 1H and Line 16 is Null
- Line 14 = 1H and Line 16 = 2C
- Line 14 != 1H and Line 16 = 2A
- Line 14 != 1H and Line 16 = 2D

Review additional information on code definitions on our [ACA 1095-C Codes Guide](#).



ACA Data Summary

This report will give you a month-by-month summary of employees and indicates any compliance alerts as well as the employees who will need to be tested in the following month to determine ACA status.



Tip: This report will default to show data for last month; update the dates by clicking the “Dates” pillbox at the top right.

Review any compliance alerts that are generated and ensure all employee data is accurate.

Form 1094-C Employee Count

This report will give you a month-by-month count that will appear in Part III of Form 1094-C.

Review to ensure counts look accurate for your employee population.

