

## Updating Employee ACA Data

The following steps will guide you through how to update employee information for ACA reporting.

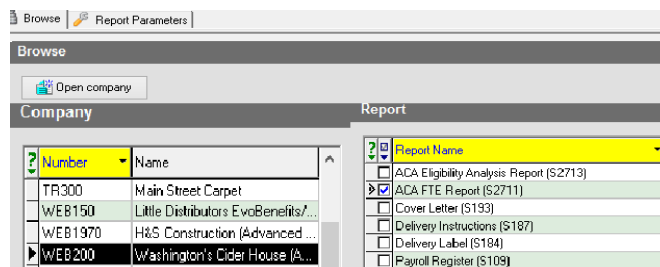
For questions regarding ACA policies and procedures consult the IRS website at [www.irs.gov](http://www.irs.gov)

### Step 1: Run the ACA FTE Report to determine if your company is an ALE (Applicable Large Employer).

NOTE: This report will show, based on payrolls selected, the number of Full Time and FTE employees in a selected period. ACA regulations state that an ALE is an employer with 50 or more Full Time and FTE employees.

**Follow the steps below to run the FTE Report:**

1. Go to **Reports-Run Reports**
2. Click the **browse** tab and select your company if needed
3. Select the **ACA FTE Report (S2711)** and go to the Report Parameters tab.
  - a. If you do not have this report contact your service provider



4. Select the payrolls for which to run the report and update any parameters on the **Misc** tab as necessary, then click on Run Reports.
5. View the task queue to see the results.
6. If you are an ALE, proceed to Step 2.
7. If you are not an ALE, you may still need to complete the sections in Step 2 and Step 3. Please contact your service Provider for more information.

### Step 2: Enter the Employees' ACA data

**Before you start to code you employees please make sure your worksite setting under Admin>Workstation settings has the box checked to show "Show Dynamic Fields". This will allow you complete effective dating when coding employees.**

**Go to the Employee – Employee – ACA tab and complete the following sections.**

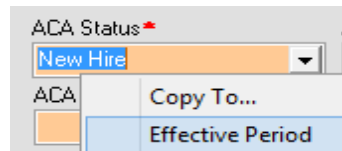
Effective dating allows you to ensure that any changes that happen within the year are selected correctly so that you can be sure to report accurate information. It is important that the effective dates of the fields listed below are correct:

1. ACA Status
2. ACA Coverage

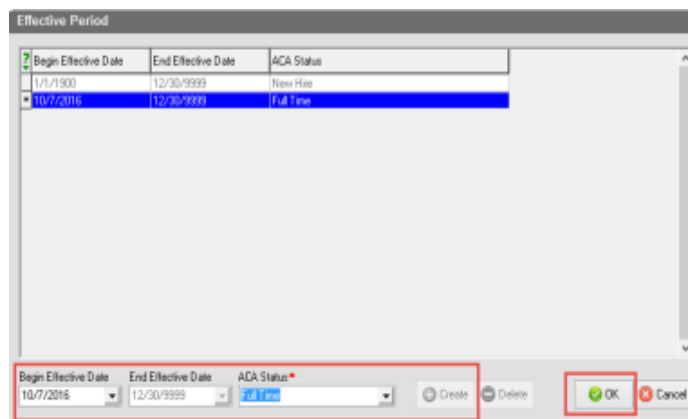
3. Applicable Section 4980H
4. Lowest cost benefit
5. ACA Policy Origin
6. Benefits eligible
7. ACA Format
8. Form Type

Follow the steps below to confirm/update the effective dates of these fields:

1. Right click on the field
2. Click Effective Period



4. The Effective Period Editor will open
5. To add a new line, Click Create
6. Change the effective date and value if needed.



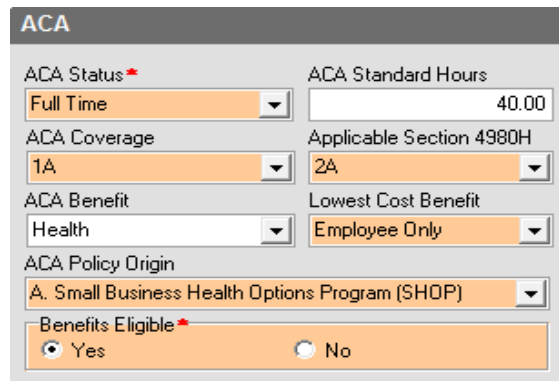
7. Click OK
8. You should now see a history line created for each time period you are referencing with the end date of the last entry being 12-30-9999 which will be the default end date until a new start date is entered.

## 1. ACA Section:

- a. **ACA Status** - Select the appropriate status of the employee based on average hours worked.
- b. **ACA Coverage** – Select the code for ACA Coverage that will be displayed on line 14 of the 1095C
- c. **Applicable Section 4980H** – Select the Code that will be displayed on line 16 of the

1095C

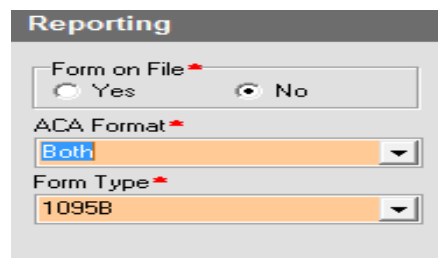
- d. **ACA Benefit** – Select the name of the benefit that will be used to determine the lowest Cost Benefit for the employee
- e. **Lowest cost benefit** – This is the lowest cost tier offered to the employee, to be used on the form 1095-C line 8
- f. **ACA Policy Origin** - Select the appropriate option for this employee for use on the Form 1095-B - Line 8.
- g. **Benefits Eligible** – Select **Yes** if the employee is eligible for benefits.



The screenshot shows the 'ACA' configuration form with the following fields and values:

- ACA Status: Full Time
- ACA Standard Hours: 40.00
- ACA Coverage: 1A
- Applicable Section 4980H: 2A
- ACA Benefit: Health
- Lowest Cost Benefit: Employee Only
- ACA Policy Origin: A. Small Business Health Options Program (SHOP)
- Benefits Eligible: Yes (selected)

## 2. Reporting Section:



The screenshot shows the 'Reporting' configuration form with the following fields and values:

- Form on File: No (selected)
- ACA Format: Both
- Form Type: 1095B

1. **Form on File** – Select **Yes** if you have written permission to release the employees 1095 form electronically.
2. **ACA Format** – Select the format by which the employee will receive their 1095 form.
  - a. **None** – the Employee will not receive a 1095
  - b. **Both** – the Employee will receive both an electronic and paper copy
  - c. **Paper** – The Employee will only receive a paper copy
3. **Form type** – Select if the employee will receive a 1095B or 1095C

## 3. ACA History Section

Update the employee ACA History by selecting the year, clicking on the ACA History tab and by using the dropdowns codes the ACA Offer of Coverage and the ACA Relief Codes.

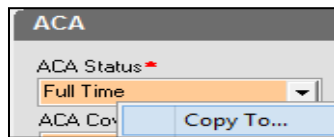
**Copy To function:**

You may also copy the selection and effective date to multiple employees. The fields listed below allow you to copy the field selection and effective date to several employees at one time.

- ACA Status
- ACA Coverage
- Applicable Section 4980H
- Lowest Cost Benefit
- ACA Policy Origin
- Benefits Eligible
- ACA Format
- Form Type

Follow the steps below to copy information to one or multiple employees:

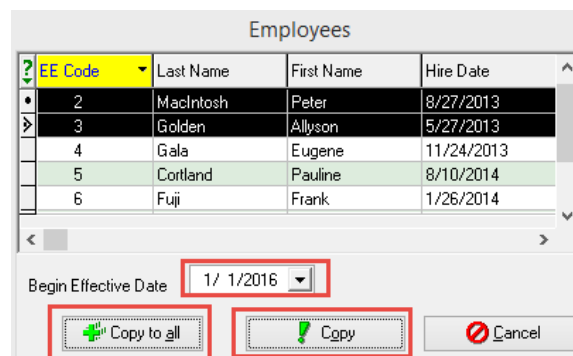
1. Right click on the field from which you will copy information.
2. Click **Copy to...**



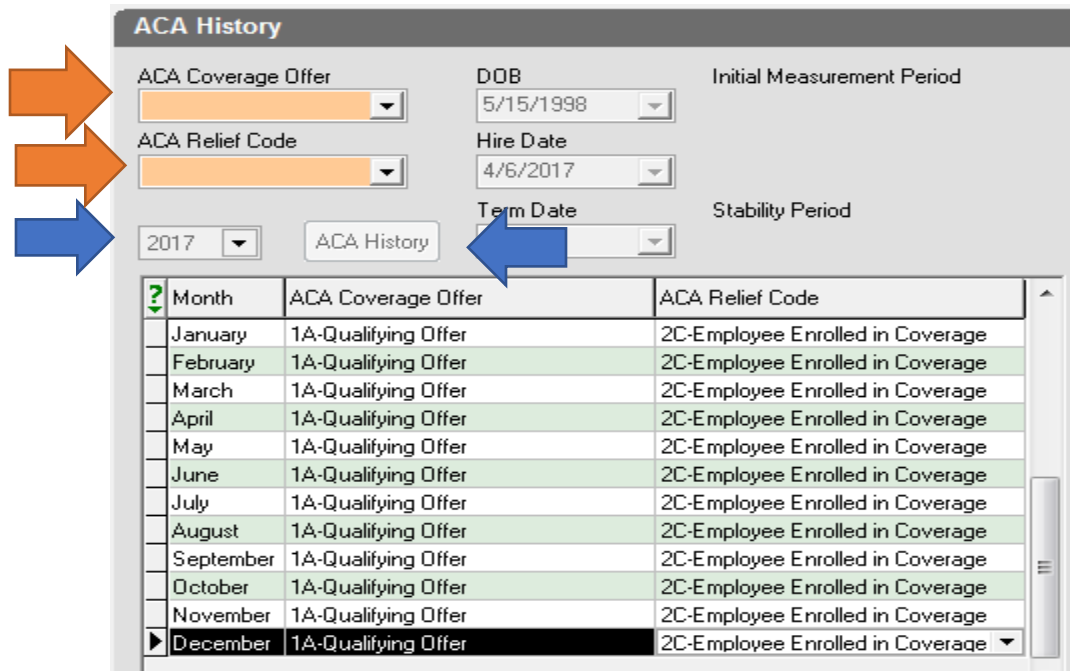
3. Select the Employee(s)

- a. To select multiple employees at one time, hold the Shift key down on your keyboard and select the employees with your mouse.

1. Update the **Begin Effective Date** to the date that should be used for these employees.
2. Click to all or copy.
3. Click **Copy to all** to copy that field and effective date to all employees
4. Click Copy to copy the field to only the selected employee(s)



You may now under the ACA History tab click the year from the dropdown and click on the ACA History button (Blue arrows) and the ACA Coverage and ACA relief codes can be added and/or edited via drop down entries by month, eliminating the need for the effective dating under the ACA Coverage Offer and ACA Relief Tabs.



**ACA History**

ACA Coverage Offer: [Dropdown]

ACA Relief Code: [Dropdown]

DOB: 5/15/1998

Hire Date: 4/6/2017

Term Date: [Dropdown]

Initial Measurement Period

Stability Period

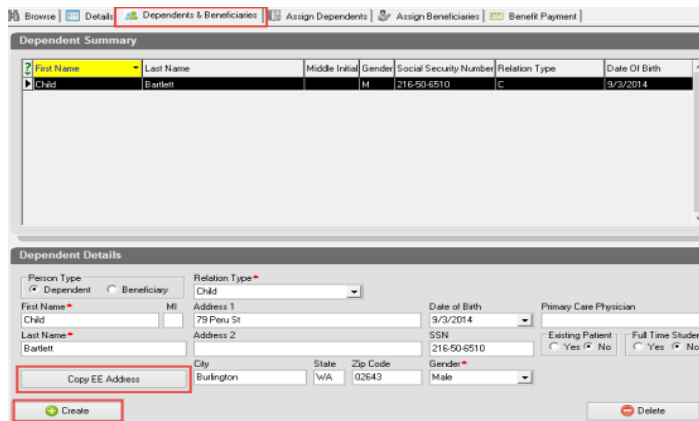
2017 [Dropdown] [ACA History Button]

Month	ACA Coverage Offer	ACA Relief Code
January	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
February	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
March	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
April	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
May	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
June	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
July	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
August	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
September	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
October	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
November	1A-Qualifying Offer	2C-Employee Enrolled in Coverage
December	1A-Qualifying Offer	2C-Employee Enrolled in Coverage

### Step 3: Health Coverage Dependents-Only needed for Self Insured employers

For reporting purposes, Employees on Self-Funded plans must have dependents reported on their 1095 forms. The Dependents may already be listed and updated correctly. Follow the steps below to review, add, or update any dependent information.

1. Go to the **HR Module-Employee-Benefits-Details tab** and confirm that the benefit is available.
  - a. If the benefit is not listed, please contact your Service Provider.
2. Go to the **Dependents & Beneficiaries Tab**.
3. Click **Create** to add the dependent if it is not already listed.

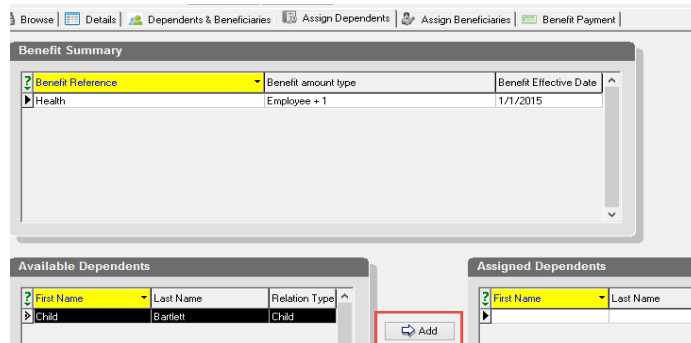


4. In **Person Type**, select **Dependent**, then enter the dependent information and then Save.
  - a. If the dependent has the same address as the employee, click copy EE address to save you time.

5. .

## 6. Assign Dependents

7. To add a dependent to a benefit:
8. Select the benefit from the **Benefit Summary** section using your mouse.
9. Next, select the dependent(s) from the list of **Available Dependents**.
10. Click **Add**



11. The dependent will then be moved to the **Assigned Dependents** Section.

**NOTE: The Begin and End dates must also be populated. These are the dates that the dependent had coverage under the Benefit plan. To update the Begin and Enddates:**

1. Check the Update ACA Dates box
2. Select the appropriate Begin date from the dropdown

Update ACA Dates

**Assigned Dependents**

Last Name	Relation Type	Begin Date	End Date
Bartlett	C	10/1/2016	

October 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
2	3	4	5	6	7	8
9	10	11	12	13	14	15

4. Save and Commit the changes.

Once all employee updates have been completed go to the reports area and select reports run reports selecting ACA 1095 Preview Report (S3125). Click on the Report Parameter. Under the MISC tab select the reporting year. **A final review of this must be completed by all employers prior to December 31<sup>st</sup> of each year.**

**\*\* Remember if you are Self-insured you should be seeing the employee and the dependent listed under each employee grid. If you do not see them this means the HR Module portion of the setup is not complete.**