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What to Get the Most Out of the ACA Manager? Here is your ACA Checklist.

There are several items in the system that drive ACA module settings: ACA Profile, Benefit Profile and Benefit Plan.

- **ACA Profile** defines the type of employee, Full-Time or Part-Time, and must be assigned to all employees accordingly.
- **Benefit Profile** defines if/when medical benefits were offered to eligible employee. It should be assigned to employees upon offering them coverage. If not done or done incorrectly, the system will produce inaccurate code in Line 14/Series 1 Code on Form 1095-C.
- **Benefit Plan** defines if employee accepted and enrolled into coverage or waived it. If employee enrolled into coverage, the corresponding medical plan should be assigned to this employee. The plan will drive the deductions automatically, once added. If not done or done incorrectly, the system will produce inaccurate code in Line 16/Series 2 Code on Form 1095-C.

There are few things you need to check for in the Payroll System:

1. **Do you have the proper ACA profiles set up?** You can view ACA profiles under Company Settings ->Profiles/Policies -> ACA (Affordable Care Act) -> ACA Profiles.   Typically, you should see this:

|				
☑		🗎	Full Time	Used for all full time employees
☑		🗎	Not Subject to ACA	
☑	✕	🗎	Part Time	Used for all part time employees

Please review each ACA Profile to make sure the Measurement, Administrative and Standard Periods are accurate.

You can only view ACA profiles, if changes are needed please contact your AccuPay processor.

2. **Do you have an ACA profile assigned to employees?** The ACA profile defines the Full-Time or Part-Time (Variable) status of your employees and should be assigned accordingly to ALL employees who were employed by your company throughout the year. You can check it by running the following report: My Reports ->ACA (Affordable Care Act) ->Employee ACA. Current ACA Profile (Effective) column will reflect all the assigned and not assigned ACA Profiles. You can change the filter for that column to "Is Null" then refresh, it will give you a list of all employees without profiles.

3. **Assigning the ACA Profile.** For any newly hired employee a corresponding ACA Profile may be assigned during the on-boarding process under the ACA tab.
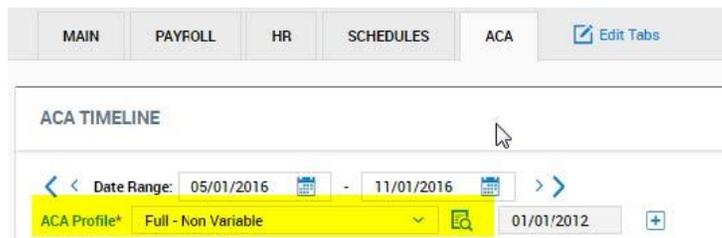
You can Mass Edit all the employees with missing ACA profiles if needed.

You can also make it a required field in the HIRE employee's screen, when you are in the hire screen, see at the top right "Global Account Policies", about half way down you will see the section of "Required Profiles", check off the box for "ACA Profile" and save. This will force you to make a selection when hiring a new employee.

4. **Do you have a Benefit Profile set up?** You can access your Benefit Profile under Company Settings ->Profiles/Policies ->Benefits ->Profiles.

Please review your Benefit Profile and make sure it is linked to a current Medical Plan:

If you have an expired Medical Plan added to the Benefit Profile, the current plan needs to be added. If you do not have Medical Plan set up in the system, it needs to be added as well.

For setting up your Medical Plans and Benefit Profiles, please contact AccuPay.

5. **Do you have a Benefit Profile assigned to all eligible employees?** You can check it by running the following report: My Reports –> HR -> Benefits ->Benefit Census Report, Add a column Current Benefit Profile.
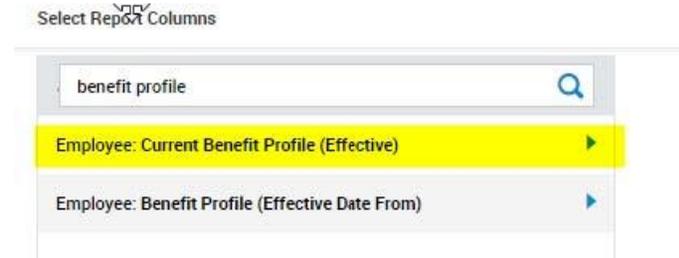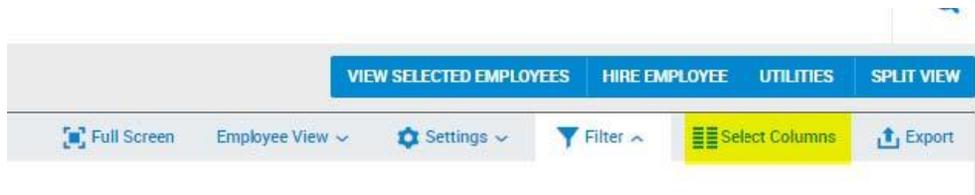
This report will help you to spot-check all the eligible employees whose Benefit Profile has been missed for any reason. You can change the filter for that column to "Is Null" then refresh, it will give you a list of all employees without Benefit profiles.

6. **Assigning the Benefit Profile.**   The Benefit Profile must be assigned to all the employees who were offered benefits (even if they waived the option), if the employee was on the same status for the full year, you can leave the system default date of 12/31/1900 and just select a profile.

However, if that's not the case, you need to use the active date of the actual offer (i.e. if your full-time eligible employee was hired on 2/1/2016 – this should be the date on the assigned profile, even though you may have a 2 month waiting period. For existing employees who became eligible and were offered coverage – the date of the Benefit Profile should be the actual offer date). You can assign the Benefit Profile to employees under the Profiles section in employee's file. You will need to click on the "Plus" sign to add another line and select an appropriate profile from the drop-down menu.

Likewise, if an employee was offered coverage for the first part of the year but later became part time without an offer of coverage, you will need to have a profile for that part of the year that an offer was available, then click the "Plus" sign and enter a date for when the employee didn't have the offer anymore, you will leave the profile section blank.

This screen shot illustrates an example of an employee who was employed the full year with no change in the benefit offer of coverage:

This screen shot illustrates an example of an employee that was hired on 02/16/16 as a full-time employee and offered coverage:


This screen shot illustrates an example of an employee that was full time till 06/30/16 with an offer of coverage, but then became part time on 07/01/16 without an offer of coverage:

7. Various **ACA reports** are available in the system for your review. One of the simplest reports that can pin-point any immediate issues is **ACA Data Summary Report**. You can access it under My Reports -> ACA (Affordable Care Act) -> ACA Data Summary.   The Dates filter allows you to define the date range for your report. Compliance Alert column shows the number of employees that need your attention in terms of compliance. By clicking on the number you will see a list of employees. Compliance alert usually indicates that an eligible employee has not been offered coverage (a Benefit Profile has not been assigned).

Possible Downgrade column usually shows the number of employees that have any upcoming change in Full or Part time status (shifts in the amount of hours worked during the period).   \
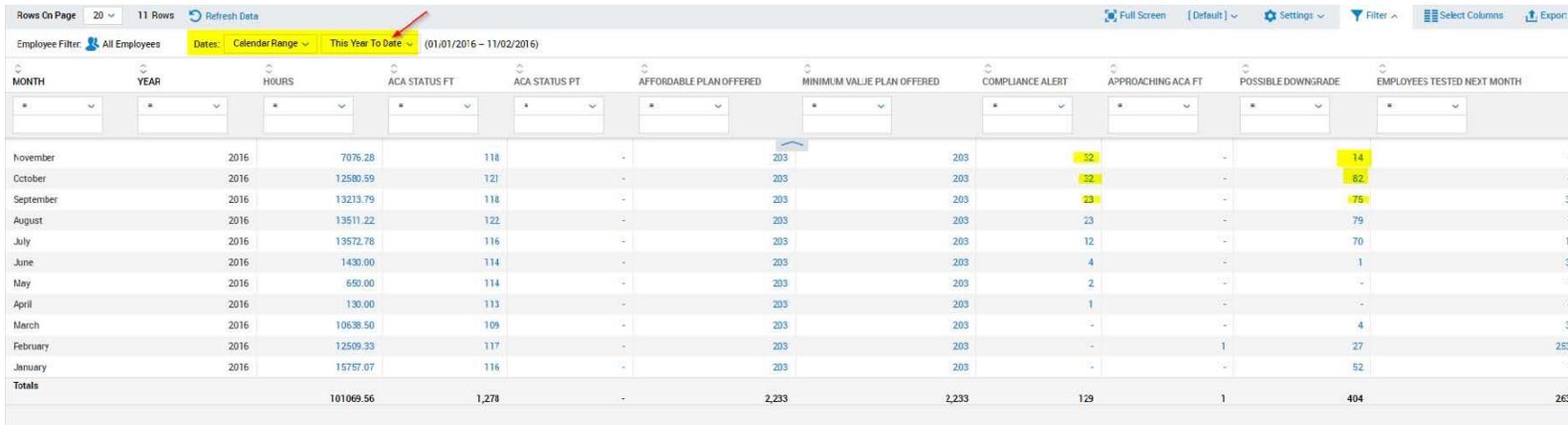
MONTH	YEAR	HOURS	ACA STATUS FT	ACA STATUS PT	AFFORDABLE PLAN OFFERED	MINIMUM VALUE PLAN OFFERED	COMPLIANCE ALERT	APPROACHING ACA FT	POSSIBLE DOWNGRADE	EMPLOYEES TESTED NEXT MONTH
November	2016	7076.28	118	-	203	203	32	-	14	-
October	2016	12580.59	121	-	203	203	32	-	82	-
September	2016	13213.79	118	-	203	203	23	-	75	3
August	2016	13511.22	122	-	203	203	23	-	79	-
July	2016	13572.78	116	-	203	203	12	-	70	1
June	2016	1430.00	114	-	203	203	4	-	1	3
May	2016	650.00	114	-	203	203	2	-	-	-
April	2016	130.00	113	-	203	203	1	-	-	-
March	2016	10638.50	109	-	203	203	-	-	4	3
February	2016	12509.33	117	-	203	203	-	1	27	253
January	2016	15757.07	116	-	203	203	-	-	52	-
Totals		101069.56	1,278	-	2,233	2,233	129	1	404	263

If you were able to fix the profiles of employees in "Compliance Alert" column (add a correct Benefit profile), you can recalculate the ACA report for each specific employee or for all. **To recalculate an employee report, you need to click "Recalculate" button under the ACA tab in employee's file – under the ACA Timeline section**. To recalculate ACA reports for all employees you can select "All" under Employee ACA report (My Reports -> ACA (Affordable Care Act) -> Employee ACA) and click "Recalculate" button at the top right.

Keeping all the records in the system up to date will help you to timely address any arising issues, make sure you have the most recent data and reports, and will make the year-end processing easy and compliant. Please feel free to contact AccuPay should you need an assistance or have any questions.