

## ACA Reporting Requirements

Applicable large employers (ALE's) must report specific information to the IRS regarding the health care coverage they offer, if any, to full-time employees. In order to determine if a company is considered an Applicable Large Employer (ALE) which will need to comply with the 2015 Patient Protection and Affordable Care Act (PPACA), the employer must have 50 or more full-time employees or 50 or more full-time equivalents in the previous year. A full-time employee, for the purposes of ACA, is any employee who averages 30 or more hours per week or 130 hours or greater per month during a calendar year. All companies under common control (ownership) are aggregated together and the sum of all the full-time employees and/or equivalents are used to determine if the FTE threshold is met. In addition, employers with a self-insured group health plan will have additional reporting requirements for any employee and dependents enrolled in the plan for any month of the reportable calendar year.

## The 1094-C and 1095-C

The 1095-C is the IRS form used to report 1.) the offer or non-offer of health care coverage to a full-time employee, 2.) the low cost of the health care offer, and 3.) the employee's enrollment or declination in the plan for each month of the reportable year. Each full-time employee will receive a copy of the 1095-C and the employer will need to file the 1095-C along with the 1094-C as the transmittal to the IRS. Employers with a self-insured health plan will need to complete Section 3 of the 1095-C which lists all covered lives (employee and dependents) enrolled in the plan. For examples of the 1094-C and the 1095-C please visit: <https://www.irs.gov/pub/irs-pdf/f1094c.pdf> & <https://www.irs.gov/pub/irs-pdf/f1095c.pdf>

## Penalties for non-compliance

Penalties for late or incorrect 1095-C & the 1094-C are steep. An ALE employer neither furnishing a form as required nor filing a form as required could be considered actions of "willful neglect" and incur double penalties. Be aware penalties have been increased annually.

## The ACA Monitor

Kemper 1<sup>st</sup> Choice Payroll offers an online ACA Monitor module for clients. The ACA Monitor provides information relative to the Affordable Care Act in a simple, straight-forward way. The ACA Monitor will keep you in compliance for the year-end reporting. The ACA Monitor shows affordability of the group health insurance by employee as well as providing the date the offer of coverage will need to be extended to an employee. Determining whether the employees are full or part-time is easy with the monthly hour tracking report within the ACA Module. The following information is the ACA Monitor Manual which will outline the available reports which will make ACA more manageable and assist with proper reporting for ACA year-end.

# Kemper 1<sup>st</sup> Choice Payroll ACA Monitor Instructions

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## Employers ACA Responsibility in the current calendar year

If you are a company that in previous calendar year has 50 or more full-time employees, or full-time equivalents, then you need to meet new federal requirements and document the availability of health insurance to your full-time employees.

### What are your ACA Requirements?

IRS Form 1095-C for every one of your full-time employees. (If you're self-insured, you will have to do that for all your employees). The 1095-C is due to employees by February 1<sup>st</sup> of the preceding year

IRS Form 1094-C employer transmittal form. Due to IRS by January 31<sup>st</sup> of the preceding year (March 31 if you are e-filing).

## First Step

The first step is to complete the Affordable Care Act Settings Form. This will allow us to set up your company according to your group health care plan document and the reportable hours needed to determine eligibility. Any time there is a change in your group health care plan, we will need to revisit the company setup to make sure the information is correct for reporting purposes. This is setup by your assigned ACA administrator and is accompanied by a phone call to be sure all hours and information are set up to reflect the actual group plan, definitions of hours and any additional information needed. (Please see attached).

## Second Step

Each individual employee that has hours in the reportable year will need to be classified as either a full-time, part-time or seasonal employee. Please remember for ACA reporting purposes that a full-time employee is an employee that averages 30 or more hours in a week or 130 hours in a month. On the employee setup, please select the "General" tab "ACA Status" and choose whether that employee is a full-time, part-time, or seasonal employee. Please fill in the effective date the employee went to the status selected. Also, if your group health coverage is a self-insured plan you will need to enter the dependents. Under the "HR Advanced" tab ->Family Members ->Choose New -> Fill in the dependent relationship, name, address, social security number, gender, birthday and when the dependent's coverage began. Please be sure to press the "Save" button after entering the information.

## Third Step

### Employee Events

Found under Clients > Employee > Events. You can either add an event to a specific employee or you can add the same event to multiple employees. You can also view the events for a single employee or for all employees on a specific company. Those critical events required for the 1095-C are highlighted in **red**.

401k Enrollment: This is for informational purposes for the client.

ACA Benefits Eligibility: This is for informational purposes for the client for now.

**ACA Declination Coverage:** This event covers the employee opting out of coverage. Please put in the start date of when the declination began. If you have an end date for the declination, please fill it in, otherwise leave it blank.

**ACA Deduction/Memo:** In the event that an employee had a deduction/memo setup but couldn't pay for it for whatever reason for that month, the client can put in this event so the system knows that the employee was covered. Please fill in the dates that the deduction/memo was not deducted or recorded in payroll.

**ACA Enrollment:** If the boxes aren't marked correctly on the 1095-C, or if there is a change (or if you know the employee is enrolled but isn't showing on the screen) you can add enrollment dates here.

**ACA Form 1095 Override Box 14/16:** If you need to override these boxes you can enter the code in the note field. Override codes can be found in the instructions for the 1095 found at the end of the monitor instructions

ACA Initial Assessment Period: will need to be added for any employees within this period currently, the system will automatically add this for all new employees based on the settings in the monitor.

**ACA Status Change:** Add any status that changed during the year along with the eligibility dates. The system will automatically add this even when an employee's ACA status has been changed in the ACA monitor

Benefits Enrollment: Informational for client to track when the employee enrolled for benefits

Rehire: Informational for client when employee is rehired

## Fourth Step

Once the first three steps are completed, you may now view the ACA Monitor for accurate results. The next section are ways to utilize the Dashboard to be sure your company is in compliance and the 1095-C's are reflecting an accurate reflection of the employee's health insurance. The settings will be filled in for your company by the ACA representative from the First Step. If you feel this is not an accurate reflection of your company, please contact us immediately so we can make sure the ACA settings are correct.

The Dashboard is a summary of the steps necessary to view your company and how it complies with the ACA laws. A green light means that all is completed or is true. So for example, a green light in the Company Settings mean that the ACA settings pages have been completed where as a red light means the information is not complete to reflect an accurate picture of the company. A green light in the Large Employer Status means that the company does meet the requirements of an Applicable Large Employer Status whereas a red light means it is not an Applicable Large Employer. Please be aware that if the company is an aggregate large employer, you will need to change the ACA Group to the authoritative member of the group of companies to get an accurate picture. If any others are red, there may need to be action taken within that step.

The next pages below will walk you through the ACA Monitor step by step if you have any additional questions.

# Dashboard

The screenshot shows a dashboard for 'Company 73 - Courtney ACA Test X2' under the 'ACA Group'. The top navigation bar includes icons for Dashboard, ACA Settings, Large Employer Status, Employee Classification Views, Employee Coverage, Employee Affordability, and Initial Assessment. The 'Actions' section contains: Recalculate Figures, Change Dates, Fill in prior information, Preview 1094C, Preview 1095C, and Check All Companies. A 'Quick Links' section includes Employee Setup. Below the navigation, three periods are listed: Measurement Prd: 5/1/2014 - 4/30/2015, Administrative Prd: 5/1/2015 - 7/31/2015, and Stability Prd: 8/1/2015 - 7/31/2016. The ALE(Large Employer) Period is 1/1/2014 - 12/31/2014. The main content area displays five steps with progress indicators:

- Step 1: Company Settings** - The PPACA settings for this company are ok. (Green indicator)
- Step 2: Large Employer Status** - You currently meet the requirement for a large employer. (69.0). You currently do not meet the requirement for W2 Health Care Reporting. (Green indicator)
- Step 3: Employee Classification** - You currently have employees that may be classified incorrectly. (7). (Red indicator)
- Step 4: Employee Coverage** - You currently have Full-Time employees not receiving benefits. (9). (Red indicator)
- Step 5: Employee Affordability** - There is insufficient data for this calculation. There are no Full-Time employees receiving benefits or not all Full-Time employees receive benefits. (Grey indicator)

A 'Preview Report' button is located in the top right corner of the dashboard area.

Company Settings – Adding your company settings for pay codes, benefits, low cost, and time periods

Large Employer Status – The system will pull in all hours selected and will display if client is considered a larger employer and will also display if ER paid health insurance needs to be reported on the W-2 box 14

Employee Classification – Calculate average hours and if employee is considered part or full time

Employee Coverage – Lists if employee is covered by health insurance

Employee Affordability – Verifies employer is in compliance with not deducting more than 9.5% of federal taxable for health insurance

Please note: The dashboard must be updated in order for your calculations to work properly.

## ACA Settings > Hours

Company 73 - Courtney ACA Test X2      ACA Group

Dashboard   ACA Settings   Large Employer Status   Employee Classification Views   Employee Coverage   Employee Affordability   Initial Assessment

Recalculate Figures   Change Dates   Fill in prior information   Preview 1094C   Preview 1095C   Check All Companies   Employee Setup

Measurement Prd: 5/1/2014 - 4/30/2015   Administrative Prd: 5/1/2015 - 7/31/2015   Stability Prd: 8/1/2015 - 7/31/2016  
 Initial Assessment Period: 12 months from date of hire.   ALE(Large Employer) Period: 1/1/2014 - 12/31/2014

Hours   Benefits   Low Cost   Periods/Rpt Options   Save

### ACA Excluded Hours

- 0-Regular Pay
- 1-Holiday
- 2-Vacation
- 3-Bereavement
- 4-Commission
- 5-Bonus
- 6-Supplemental Pay
- 7-Sick

**ACA Excluded Hours**  
 In calculating an employee's ACA Status, all hours except the ones selected here will be used to determine ACA Status. To exclude any hours, just mark the box next to the hours needing to be excluded

**ACA Excluded Hours** – This area will provide you a list of pay codes from your client setup area. Please mark those that you would like excluded from your calculation. Once selected, please click Save to right upper part of your screen.

## ACA Settings > Benefits

Company 73 - Courtney ACA Test X2      ACA Group

Dashboard   ACA Settings   Large Employer Status   Employee Classification Views   Employee Coverage   Employee Affordability   Initial Assessment

Recalculate Figures   Change Dates   Fill in prior information   Preview 1094C   Preview 1095C   Check All Companies   Employee Setup

Measurement Prd: 5/1/2014 - 4/30/2015   Administrative Prd: 5/1/2015 - 7/31/2015   Stability Prd: 8/1/2015 - 7/31/2016  
 Initial Assessment Period: 12 months from date of hire.   ALE(Large Employer) Period: 1/1/2014 - 12/31/2014

Hours   Benefits   Low Cost   Periods/Rpt Options   Save

### ACA Benefits

**Included Deductions**

- 1-Uniform
- 2-Admin Fee
- 3-Child Support 1
- 4-Child Support 2
- 5-Child Support 3
- 6-Child Support 4
- 7-Garnishment Admin
- 8-Background Check
- 9-POP EE Medical
- 10-Garnishment Atty Fee

**Included Memos**

- 1-Employer Paid Health Insurance

**ACA Benefits**  
 We need to know which deductions and memos are associated to health care benefits. Check the boxes for all the deductions and memos for any health care benefit that should be used in determining which employees have benefits.

**Benefits** – Please select your Medical Insurance codes that should be applied to this calculation. Once selected, please click Save to right upper part of your screen.

## ACA Settings > Low Cost

Company 73 - Courtney ACA Test X2      ACA Group

Dashboard   ACA Settings   Large Employer Status   Employee Classification Views   Employee Coverage   Employee Affordability   Initial Assessment

Recalculate Figures   Change Dates   Fill in prior information   Preview 1094C   Preview 1095C   Check All Companies   Employee Setup

Measurement Prd: 5/1/2014 - 4/30/2015   Administrative Prd: 5/1/2015 - 7/31/2015   Stability Prd: 8/1/2015 - 7/31/2016  
 Initial Assessment Period: 12 months from date of hire.   ALE(Large Employer) Period: 1/1/2014 - 12/31/2014

Hours   Benefits   Low Cost   Periods/Rpt Options   Save

### ACA Benefit Low Cost Option

Drag a column header here to group by that column

Code	Description	Low Cost Option
9	9-POP EE Medical	56.53
14	14-Medical Insurance	45.32

**ACA Benefit Low Cost**  
 For each deduction selected in the ACA Benefits section, we need to know the low cost option for that benefit to determine benefit affordability. If you are not sure about your low cost options, consult with your health care agent.

**Low Cost** – Enter in your low cost options per medical code selected then save

## ACA Settings > Period/Report Options

Company 73 - Courtney ACA Test X2						ACA Group	
Dashboard	ACA Settings	Large Employer Status	Employee Classification Views	Employee Coverage	Employee Affordability	Initial Assessment	Recalculate Figures
						Change Dates	Preview 1094C
						Fill in prior information	Preview 1095C
						Check All Companies	
						Employee Setup	
						Quick Links	
Measurement Prd: 5/1/2014 - 4/30/2015		Administrative Prd: 5/1/2015 - 7/31/2015			Stability Prd: 8/1/2015 - 7/31/2016		
Initial Assessment Period: 12 months from date of hire.				ALE(Large Employer) Period: 1/1/2014 - 12/31/2014			
Hours	Benefits	Low Cost	Periods/Rpt Options				
<b>Measurement Period</b>							
Start Month:	5 - May						▼
Start Day:	01						▼
No. Months:	12						▼
<b>Administrative Period</b>							
Start Month:	5 - May						▼
Start Day:	01						▼
No. Months:	3						▼
<b>Stability Period</b>							
Start Month:	8 - August						▼
Start Day:	01						▼
No. Months:	12						▼
<b>New Employee Rules</b>							
Initial Assessment Prd lasts:	12	Months	▼	starting from:	Hire Date		
Eligible for Benefits starting:	2	Months	▼	after:	First Day of First Full Month After Hire		
<b>Report Options</b>							
Certification of Eligibility:							▼
Affordability override:							▼
Coverage Override:							▼
4980 Transition Relief:							▼
Previous Low Cost:	0.0000						▼
Date Previous low cost ended:	5/1/2014						▼

There are time periods that the ACA ruling has defined that are stored on the company level. In the ACA calculations, the ACA monitor uses the Measurement Period and also the Initial Assessment Period. The other two periods are for company reference

**Measurement Period** – This is the period of time used to calculate average hours for the company or employee. This period is used to determine if the company is subject to the ACA laws.

**Administrative Period** – This is the time period after the measurement period that the company is allowed to use to gather the information on the calculations on the employees and offer insurance if needed. The company does not have to use this time period

**Stability Period** – This is the period of time after the measurement and administrative period in which the employee ACA classification and benefits offered must remain the same

**New Employee Rules** – There are two rules that can be set up for new employees to assist in automatically filling in the employee period in employee events.

The first rule is the initial assessment period which fills in the employee initial assessment period event. To set up the initial assessment rule, fill in the number of days or months in the first box. Then select the option Day/Month in the next box to coincide with that number. The last box is when to start this period. It is either from hire date or from the first day of the first full month after the hire date

The other rule is the employee benefit rule. This create the event employee benefits eligibility. This should only be used in the case where the employer pays the total cost of the employee health care and no deduction or memo is set up for the employees who have insurance. It follows the same setup style as the initial assessment setup

**Report Options** – The options in this section flow to the 1094-C & 1095-C. The options will correspond to a code or an option to check a box on one of these forms. The form instructions will have information on these items and when to pick them.

The Certification of Eligibility is used to check a box on form 1094-C, box 22. Select the letter of the box that needs to be checked if appropriate. There are 2 and 3 letter combinations if more than one box needs to be checked.

Coverage Override is used to override the code in box 14 on form 1095-C for all employees in the company. Select the appropriate letter of coverage. For instance, if code '1A' should be used for all employees offered coverage, select 'A'. By default the code in box 14 is '1E'. Enter the override if that is not the appropriate code for the entire company.

Previous Low Cost is the low cost value of the health care changed during the year. Enter the previous amount and the date it ended. On the form 1095-C line 15, it will use this value for the months up to this date and then use the current low cost amount set up in the ACA monitor for the rest of the months in that year.

Affordability override is used to override the code in box 16 on form 1095-C in the case where the employee was offered coverage but opted out. By default, it will put the code '2F' for all employees with this case. If the company uses another sage harbor for affordability. i.e. federal poverty line, enter the letter of the appropriate code to override the '2F' for all employees in the company. Refer to 1095-C instructions for available codes.

4980 Transition Relief is used for form 1094-C. Refer to 1094-C instructions for code descriptions.

## Large Employer Status

**Large Employer Status**  
 You currently meet the requirement for a large employer. (71.1)  
 You currently do not meet the requirement for W2 Health Care Reporting.

**Employee Count**

Month	Full Time Employees	Full-Time Equivalents	Total Employees
May	34.0	15.8	49.8
June	19.0	45.0	64.0
July	18.0	46.5	64.5
August	21.0	46.6	67.6
September	19.0	47.0	66.0
October	32.0	60.0	92.0
November	20.0	45.8	65.8
December	22.0	42.5	64.5
January	8.0	52.8	60.8
February	22.0	46.8	68.8
March	21.0	51.2	72.2

**W2 Health Care Reporting**

Item	Year	Count
W2	2014	166
1099	2014	0

**Large Employer Status** – This will calculate the full time employees and full time equivalents according to ALE Period chosen. This section will also calculate if you are required to report employer paid health insurance in box 14 on the W-2

# Employee Classification

Company: 73 - Courtney ACA Test X2 | ACA Group

Dashboard | ACA Settings | Large Employer Status | Employee Classification Views | Employee Coverage | Employee Affordability | Initial Assessment | Recalculate Figures | Change Dates | Fill in prior information | Preview 1094C | Preview 1095C | Check All Companies | Employee Setup

Measurement Prd: 5/1/2014 - 4/30/2015 | Administrative Prd: 5/1/2015 - 7/31/2015 | Stability Prd: 8/1/2015 - 7/31/2016  
 Initial Assessment Period: 12 months from date of hire. | ALE(Large Employer) Period: 1/1/2014 - 12/31/2014

Employee Classification | Show Misclassified Only | Show Div/Dept No. only | Change Statuses | Save | Preview

Drag a column header here to group by that column

Comp...	ID	First	Mid.	Last	Division	Department	Avg Hrs	Current ACA St...	Calculated ACA S...	Hire Date	Term Date
73	24	Mireya		Tester	4 - Janito...	5 - Tx-DO...	40.12	Part-Time	Full-Time	9/20/2010	
73	48	Danny	J.	Tester	4 - Janito...	4 - John ...	16.38	Full-Time	Part-Time	9/20/2010	
73	95	Josephine	A.	Tester	4 - Janito...	8 - Tx-DO...	31.25	Part-Time	Full-Time	9/20/2010	
73	113	Antonia		Smith	4 - Janito...	9 - Tx-DO...	38.51	Part-Time	Full-Time	9/20/2010	
73	120	David	D.	Smith	4 - Janito...	4 - John ...	18.26	Full-Time	Part-Time	9/20/2010	
73	124	Frank	C.	Smith	4 - Janito...	14 - Tx-DMV	8.09	Full-Time	Part-Time	11/7/2011	
73	137	Herminia	M.	Doe	4 - Janito...	9 - Tx-DO...	38.19	Part-Time	Full-Time	9/20/2010	

**Employee Classification**  
 ACA Status is independent of any other employee classification. A full-time employee is a common law employee who has on average at least 30 hours of service per week or 130 hours in a calendar month.

Shown are your employees with their current ACA Status and our calculated ACA Status based on hours worked.

**Red Rows**  
 Red rows show employees that are marked as other than Full-Time but may be classified as Full-Time based on hours worked. These may need to be updated by either changing their status by clicking on the field in the table or by click "Change All Statuses", which will update them to the calculated status automatically.

**Yellow Rows**  
 Yellow rows show employees that are marked as Full-Time but have not worked enough hours to require Full-Time status. This is just for your information.

**Employee Classification** – This will calculate the average hours per week according to the measurement period. Any employee with over 30 hours will calculate as full-time. Under 30 hours will calculate as part-time. You can either change each employee current ACA status one at a time, or you can click on change statuses and change all calculated full time together or all part time together. Changing the status will automatically create an employee event and will fill ACA status on employee setup > hr basic tab > ACA status. By default, you will only see misclassified (calculated status differs from current status) employees, but there is an option to show all employees.

# Employee Coverage

Dashboard | ACA Settings | Large Employer Status | Employee Classification Views | Employee Coverage | Employee Affordability | Initial Assessment | Recalculate Figures | Change Lockback | Fill in prior information | Preview 1094C | Preview 1095C | Check All Companies

Measurement Prd: 5/1/2014 - 4/30/2015 | Administrative Prd: 5/1/2015 - 7/31/2015 | Stability Prd: 8/1/2014 - 7/31/2015  
 Current Lookback Prd: 5/1/2014 - 4/30/2015 | Initial Assessment Period: 12 months from date of hire.

Employee Coverage | Full-Time Only | Not Receiving Benefits Only | Preview

Drag a column header here to group by that column

Company	ID	First	Mid.	Last	Div	Dept	ACA Status	Receive Benefits
73	1564	Donald	R.	Tester	0	1	Full-Time	NO
73	1574	Cody	M.	Tester	4	4	Part-Time	NO
73	1578	Antoinette	J.	Tester	0	1	Part-Time	NO
73	1583	Esther	G.	Tester	4	2	Part-Time	NO
73	1584	Teresa	A.	Tester	4	7	Part-Time	NO
73	1593	Joann	G.	Tester	4	9	Part-Time	NO
73	1594	David	G.	Tester	4	8	Part-Time	NO
73	1600	Meloni	T.	Tester	4	6	Part-Time	NO
73	1604	Deunte	D.	Tester	4	8	Part-Time	NO
73	1611	Ashika	R.	Tester	4	6	Part-Time	NO
73	1612	Keith	R.	Tester	4	6	Part-Time	NO
73	1613	Maria	G.	Tester	4	8	Part-Time	NO
73	1614	Robert	C.	Tester	4	8	Part-Time	NO
73	1616	Treveno	D.	Tester	4	4	Part-Time	NO
73	1617	Ivory	V.	Tester	4	8	Part-Time	NO
73	1621	Erica	M.	Tester	4	4	Part-Time	NO
73	1622	Vladimir	R.	Tester	1	3	Part-Time	NO
73	1623	Lora	A.	Tester	1	3	Part-Time	NO
73	1624	Maria	C.	Tester	1	3	Part-Time	NO
73	1629	Lauren	H.	Tester	4	8	Part-Time	NO
73	1630	Kelvin	L.	Tester	1	3	Part-Time	NO
73	1631	Jermaine	A.	Tester	1	3	Part-Time	NO
73	1639	Lavanda	F.	Tester	4	6	Part-Time	NO

**Employee Coverage**  
 You may be subject to penalties for employees that qualify for ACA Full-Time status but do not have health benefits.

This is a list of employees that we show qualify as ACA Full-Time status but do not have health benefits.

**Employee Coverage** – By default, this step will show employees that are full time and not receiving benefits. You can also un-check those filters to view all employees.

## Employee Affordability

Company: 73 - Courtney ACA Test X2 | ACA Group

Navigation: Dashboard, ACA Settings, Large Employer Status, Employee Classification, Employee Coverage, Employee Affordability, Initial Assessment, Recalculate Figures, Change Dates, Fill in prior information, Preview 1094C, Preview 1095C, Check All Companies, Employee Setup, Quick Links

Measurement Prd: 5/1/2014 - 4/30/2015 | Administrative Prd: 5/1/2015 - 7/31/2015 | Stability Prd: 8/1/2015 - 7/31/2016  
 Initial Assessment Period: 12 months from date of hire. | ALE(Large Employer) Period: 1/1/2014 - 12/31/2014

**Employee Affordability**  Show Exceptions Only Preview

Drag a column header here to group by that column

Company	ID	First	Mid	Last	Division	Department	Fed. Taxable	9.5% of Taxable	Low Cost	Difference
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Employee Affordability  
 ACA health benefits must not cost the employee more than 9.5% of the employees gross wages (or household gross wages) or penalties may occur.

**Employee Affordability** – This step will show any employee who is receiving benefits, but is paying more than 9.5% of federal taxable gross. You can un-check the 'show exceptions' filter to view all employees.

## Initial Assessment

Navigation: Dashboard, ACA Settings, Large Employer Status, Employee Classification, Employee Coverage, Employee Affordability, Initial Assessment, Recalculate Figures, Change Lookback, Fill in prior information, Preview 1094C, Preview 1095C, Check All Companies

Measurement Prd: 5/1/2014 - 4/30/2015 | Administrative Prd: 5/1/2015 - 7/31/2015 | Stability Prd: 8/1/2014 - 7/31/2015  
 Current Lookback Prd: 5/1/2014 - 4/30/2015 | Initial Assessment Period: 12 months from date of hire.

**Initial Assessment** Preview

Drag a column header here to group by that column

Company	Employee	Hire Date	Start Date	End Date
73 - Courtney ACA Test X2	1624 - Maria C. Tester	4/1/2015	4/1/2015	3/31/2016
73 - Courtney ACA Test X2	1625 - Christina M. Doe	4/1/2015	4/1/2015	3/31/2016
73 - Courtney ACA Test X2	1626 - McHarvey Tester	4/1/2015	4/1/2015	3/31/2016
73 - Courtney ACA Test X2	1627 - Justin C. Tester	4/1/2015	4/1/2015	3/31/2016
73 - Courtney ACA Test X2	1628 - Joma K. Tester	4/1/2015	4/1/2015	3/31/2016
73 - Courtney ACA Test X2	1629 - Lauren H. Tester	4/14/2015	4/14/2015	4/13/2016
73 - Courtney ACA Test X2	1630 - Kelvin L. Tester	4/13/2015	4/13/2015	4/12/2016
73 - Courtney ACA Test X2	1631 - Jermaine A. Tester	4/13/2015	4/13/2015	4/12/2016
73 - Courtney ACA Test X2	1632 - Marcus A. Doe	4/13/2015	4/13/2015	4/12/2016
73 - Courtney ACA Test X2	1633 - Steven D. Tester	4/17/2015	4/17/2015	4/16/2016
73 - Courtney ACA Test X2	1634 - Joshua R. Doe	4/22/2015	4/22/2015	4/21/2016
73 - Courtney ACA Test X2	1635 - Jan O. Tester	4/22/2015	4/22/2015	4/21/2016
73 - Courtney ACA Test X2	1636 - Melvin K. Doe	4/24/2015	4/24/2015	4/23/2016
73 - Courtney ACA Test X2	1637 - Franklin E. Doe	4/27/2015	4/27/2015	4/26/2016
73 - Courtney ACA Test X2	1638 - Marissa L. Tester	4/28/2015	4/28/2015	4/27/2016
73 - Courtney ACA Test X2	1639 - Lawanda F. Tester	4/27/2015	4/27/2015	4/26/2016
73 - Courtney ACA Test X2	164 - Lindsey R. Doe	8/18/2014	8/18/2014	8/17/2015
73 - Courtney ACA Test X2	1640 - Stephanie M. Tester	5/4/2015	5/4/2015	5/3/2016
73 - Courtney ACA Test X2	1641 - Rodney C. Doe	5/11/2015	5/11/2015	5/10/2016
73 - Courtney ACA Test X2	1642 - Dallas R. Tester	5/11/2015	5/11/2015	5/10/2016
73 - Courtney ACA Test X2	1643 - Montreal Tester	5/11/2015	5/11/2015	5/10/2016
73 - Courtney ACA Test X2	1644 - Eddie L. Tester	5/11/2015	5/11/2015	5/10/2016
73 - Courtney ACA Test X2	1645 - Irene F. Tester	5/26/2015	5/26/2015	5/25/2016
73 - Courtney ACA Test X2	1646 - Test Tester	4/1/2015	4/1/2015	3/31/2016

**Initial Assessment** – Employees shown on this tab will not show in employee classification, employee coverage, or employee affordability tabs as their hours are still being tracked to see if they qualify for benefits according to the periods set up on the company.

## Calculations

Dashboard ACA Settings Large Employer Status Employee Classification Views Employee Coverage Employee Affordability Initial Assessment

Recalculate Figures Change Lookback Fill in prior information Preview 1094C Preview 1095C Check All Companies

Measurement Prd: 5/1/2014 - 4/30/2015 Administrative Prd: 5/1/2015 - 7/31/2015 Stability Prd: 8/1/2014 - 7/31/2015  
 Current Lookback Prd: 5/1/2014 - 4/30/2015 Initial Assessment Period: 12 months from date of hire.

**Recalculate Figures** – If any changes are made after monitor is launched, you can recalculate figures and the system will re-calculate based on the changes made.

**Change Dates** – This option will allow you to change the Measurement dates and/or ALE dates as a 1 time change. The next time the monitor is launched, the system will use default dates on the settings tab.

**Fill In Prior Information** – Using this option will fill in any prior information on employee events according to periods set up. i.e. initial assessment period, benefits eligibility

**Preview 1094C** – This will show a preview of the 1094C for selected company

**Preview 1095C** - This will show a preview of the 1095C for selected company/employees

**Check All Companies** – This option will scan the entire database and list the below info. Depending on your database size, this report can take hours to run

Co #	Name	W2 Forms	Large ER	Large ER?	EE Classification	MisClassified?	EE Affordability	Affordability Issue?	EE Benefits	Benefits Issue?
38	Sample Co	21	11.8	NO	26	YES	0	NO	0	NO

## Employee Setup



This is just a shortcut to edit employee master.