ACA Company Settings

There should be an ACA Tab for you to click on with the "ACA settings"

☐	Contact Name	Make sure that you have the proper contact for this field. This is what will be filed to the IRS as your company contact.
☐	Contact Phone	Make sure you have a current and active phone number. This will be filed to the IRS and will be on your Employees 1095-C forms. A general main number is ideal.
☐	Electronic Consent	You can Enable Electronic consent which will give your employees the option to consent to electronic delivery. It is important to note that turning this on does not mandate electronic delivery.
☐	Mask SSN	Enable Mask SSN to provide an extra layer of security to the printed 1095-C forms. Why not secure your employee's information as much as possible?
☐	ALL EINs	These will need to be completed for each EIN in the drop down if you have multiple EINs within your Login. You would have a drop-down in the upper left of the screen with the different EINs if you are.

ACA Setup Review Report

Turn Others' Settings ☑ on and filter search Saved As Name "starts with" **ACA.** Find the **ACA Setup Review** report

☐ **Active - ACA profiles assigned to everyone**

Everyone hired into the system needs to have an ACA profile assigned to them. Without the ACA profile there will be zero ACA data generated for that employee. Which means the system will not produce a 1095-C form for them and will not be able to read hours to know if they qualified as FT or not.

Filter	Employee Status: != Terminated
Filter	Current ACA Profile (Effective): Is Null
Action	Assign the appropriate ACA Profile to those who are Null

☐ **Active - Those with a Full-time or Non-Variable ACA profile have a Benefit Profile**

Anyone with a Full-time or Non-Variable ACA profile will be seen by the system as expecting an offer of health coverage after their waiting period has expired. The Benefit Profile is what the system reads to measure this offer and the affordability.

Filter	Employee Status: != Terminated
Filter	Current ACA Profile (Effective): = Full-time (substitute your ACA profile name)
Filter	Current Benefit Profile (Effective): Is Null
Action	Assign the Benefit profile to those that were offered Health Insurance

☐ **Terminated - ACA profiles assigned to everyone**

Filter	Employee Status: = Terminated
Filter	Date Terminated: >= 01/01/2024
Filter	Current ACA Profile (Effective): Is Null
Action	Assign the appropriate ACA Profile to those who are Null

☐ **Terminated - Those with a Full-time or Non-Variable ACA profile have a Benefit Profile**

Filter	Employee Status: = Terminated
Filter	Date Terminated: >= 01/01/2024
Filter	Current ACA Profile (Effective): = Full-time (substitute your ACA profile name)
Filter	Current Benefit Profile (Effective): Is Null
Action	Assign the Benefit profile to those that were offered Health Insurance

Employee Benefit Plan Coverage End Date

☐ **Terminated - Make sure the Coverage Effective To has been properly end dated (extremely important if self-funded)**

This is important in the reporting of the ACA to let the system know when the Coverage ended after termination. Typically, the coverage will end at the end of the termination month or the day of termination. An improper date could lead to not reporting a month that you provided coverage or reporting that you provided coverage for months that you did not.

Select Columns	Coverage Effective To
Filter	Employee Status: = Terminated
Filter	Date Terminated: >= 01/01/2024
Filter	Benefit Type: = medical
Action	Look at the Coverage effective dates and make sure the coverage has been properly end-dated with your plan's policy. Especially look for those with a date of 12/31/9999.

Recalculate

☐

Filter	Current ACA Profile (Effective): Is Not Null
Action	Select All Employees
Action	Click Recalculate in the upper right corner of the screen

Alerts

☐

Filter	Date Range set to pull all of 2024 "This year" or "Last Year" typically
Action	Review the compliance alerts and make the appropriate adjustments

COBRA

☐

Active Employees	Begin a list of all Employees who were offered COBRA coverage while still an active employee. An Example of this would be somebody who went from Full-time to Part-time and lost medical coverage as a result.

Self-Insured Additional Steps

☐

Benefit Plans	Double-check and make sure that all Self-Insured medical plans are check marked to be identified as self-insured. This will be on the left-hand side of the benefit plan details.
Benefit Plans	Double-check to make sure that the dependents are attached to the medical plans. You can do this by going to: My Employees > Employee HR Maintenance > Benefits > Dependents. Filter for benefit type = Medical.
COBRA Terminated Employees	Begin a list of Employees that terminated with the employee or their dependents enrolled in COBRA coverage. This must be reported on the 1095-C and will require a manual review. We will need the specifics for each person enrolled (start dates and end dates of COBRA coverage)
COBRA Not Employed in 2024	Begin a list of former employees who did not work 1 day for you in 2024, but either they or their dependent(s) were on COBRA. We will manually add their 1095-C form and code these individuals. This information must be reported by you on the 1095-C.