GREENSHADES

LET US HANDLE THAT

Dynamics Payroll Inspector Affordable Care Act Widgets Redesign Guide

1. Introduction and Overview 3
2. Employee ACA Full-time Status Widget 4
2.1. Settings: ACA Full-Time Status widget 4
2.1.1. Aggregated ALE Group 6
2.1.2. Company Settings 6
2.1.3. Measurement Groups 11
2.2. Results: ACA Full-Time Status widget 13
2.2.1. Full-Time Status Results Dashboard 13
2.2.2. Full-Time Status Results Grid and Reporting 15
2.2.3. Hours Worked per Week Breakdown 17
2.2.4. Status Explanation and Updating/Change Capability 18
3. Employee ACA Coverage Widget 19
3.1. Settings: ACA Coverage widget 19
3.1.1. Company Settings 21
3.1.2. Deductions 21
3.1.3. GP Human Resources Usage 21
3.1.4. Plan Groups *(Previously Code Mapping)* 21
3.1.5. Affordability Groups 27
3.2. Results: ACA Coverage widget 27
3.2.1. Coverage Results Dashboard 27
3.2.2. Coverage Results Grid and Reporting 29
3.2.3. Employee Coverage Details 32

1. Introduction and Overview

The Affordable Care Act modules within Dynamics Payroll Inspector (DPI) have recently undergone a redesign to enhance compliance and improve the user experience. Based on valuable user feedback, the settings and results workflows have been streamlined, restructured to present key information that users are looking for, controlling data inputs for 1095-C report generation, and exporting customized reports.

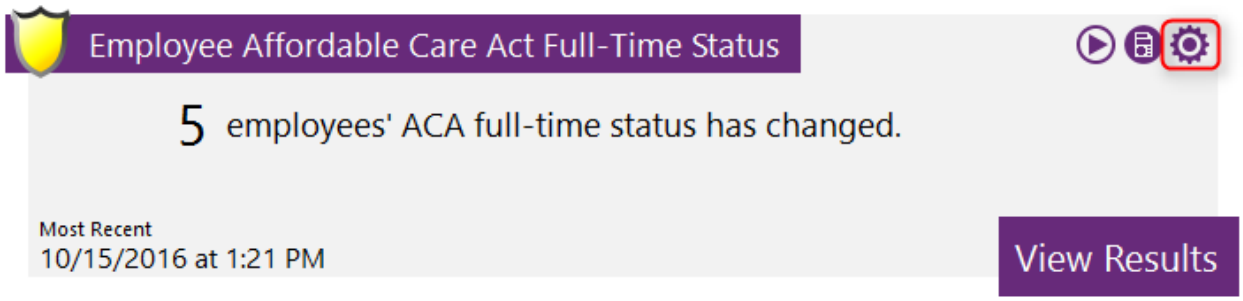
As an overall enhancement across the product, helpful links providing additional IRS documentation, reference, or scenarios have been included. Wherever the user runs across verbiage in blue or a icon, click for more details pertaining to the item and/or an IRS documentation link for additional information.

This guide serves as a companion to the ACA User Guide, which has also been updated to appropriately reflect these changes. It provides a breakdown of the new settings and functionality, as well as a mapping guide of where previous settings and results have been relocated within the redesigned screens.

2. Employee ACA Full-time Status Widget

2.1. Settings: ACA Full-Time Status widget

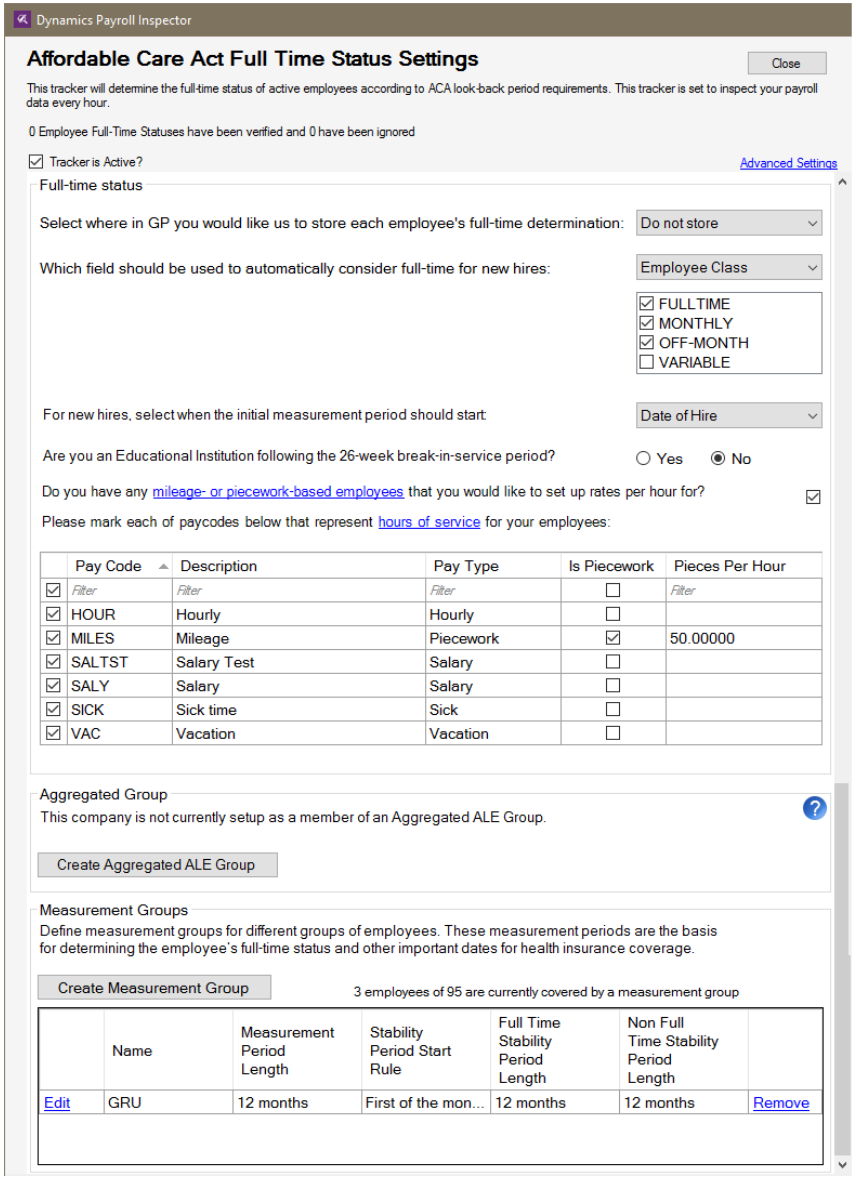
The Employee ACA Full-Time Status widget settings are still accessible through the gear icon in the top right corner of the widget.



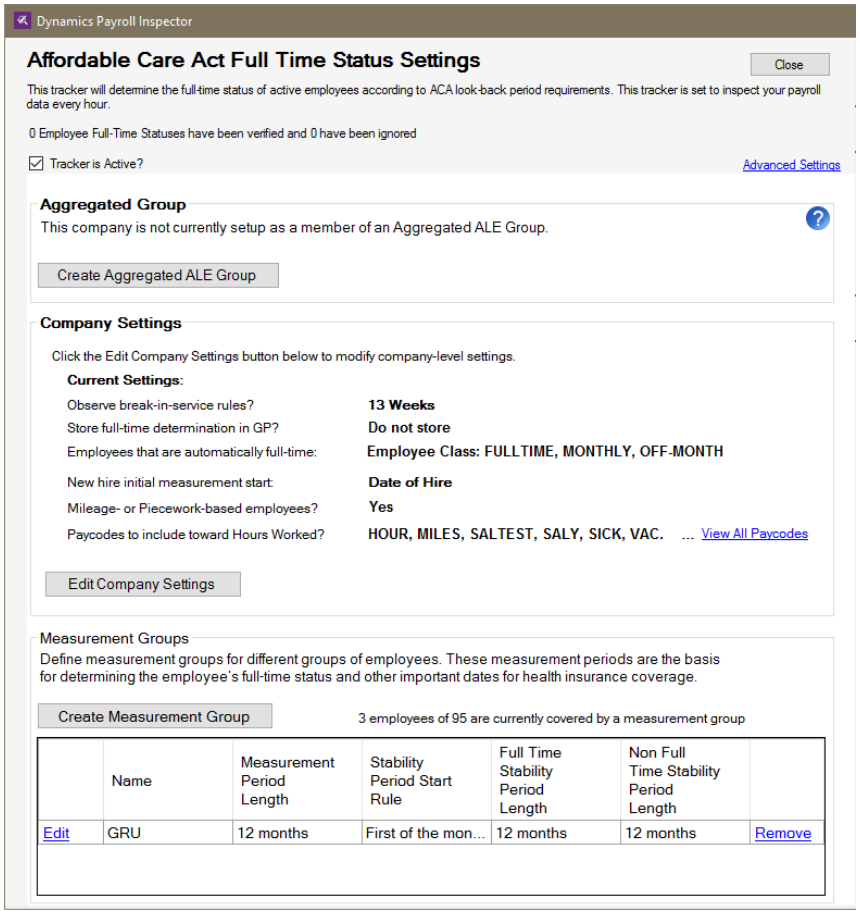
Once the user accesses the settings screen, a few things may look a bit different, but rest-assured that all existing settings have been maintained.

Let's take a look at what has changed and where settings have been relocated to. The following page shows a comparison of the previous settings and the new settings screens.

Previous Full-Time Status Settings Screen



New Full-Time Status Settings Screen



2.1.1. Aggregated ALE Group

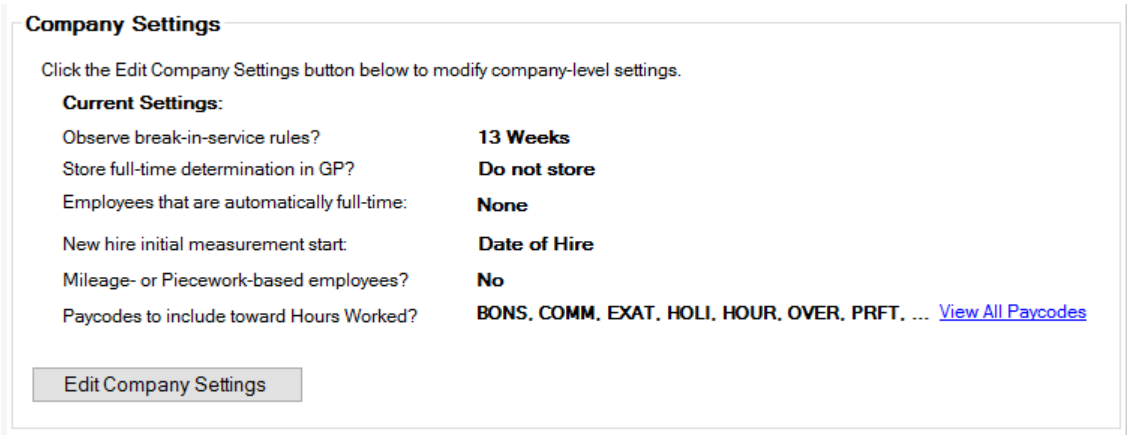
The Aggregated ALE Group setup section has just been relocated to the top section of the settings and will maintain any previously set up Aggregated ALE Groups. If a company is a member of an Aggregated ALE Group, the subsequent settings may or may not need to be set up aggregately (will be indicated).

There were no changes to the Creating and Management process for Aggregated ALE Groups.

2.1.2. Company Settings

This is a new section within the settings, however it contains all existing settings that are required to be set at the company-level (even if Aggregated for each company within the group). These settings have been consolidated into a wizard workflow to walk the user through each setting in succession and then displayed for reference purposes on the main settings screen.

Most of these settings have been maintained in their original functionality, while others were enhanced to comply with updated ACA regulations and/or give the user more manual control over the data used to calculate employees' full-time status determination. Those settings that experienced a change are notated in bold within their explanation in the following pages.

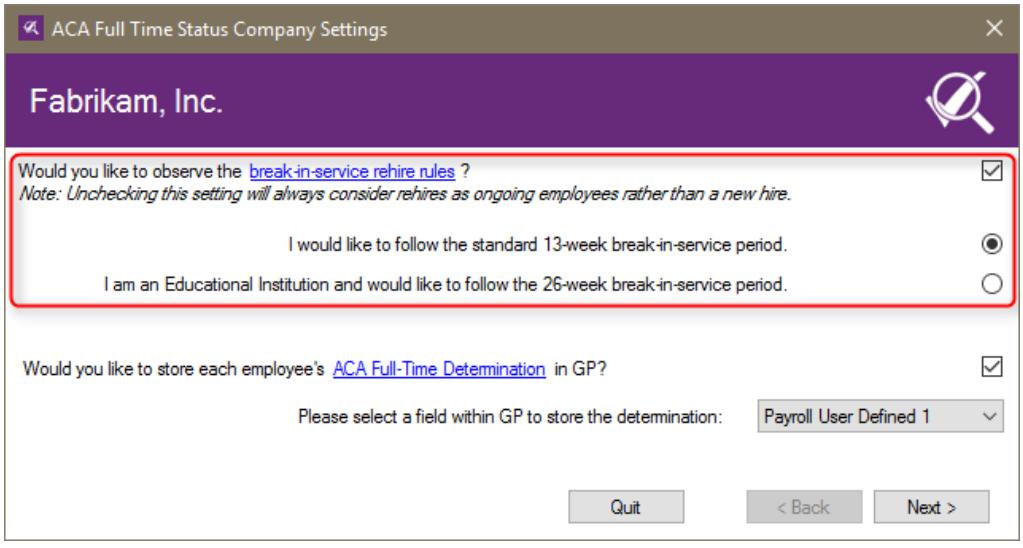


2.1.2.1. Break in Service Rehire Rules

Previously, the Payroll Inspector was automatically applying the standard 13-week break-in-service rehire rule and users had the option to alternatively apply the 26-week rule if they qualified as an Educational Institution. In the 2016 tax year, the IRS has clarified that under ACA regulations ALE members do not have to apply the 13-week rule (outside of the standard rules of parity) and may always consider an employee that has been rehired or continues working beyond the set 13- or 26-weeks as an ongoing employee for status determination purposes.

In the revised setting, now on the first step of the Company Settings wizard, users may choose to disable the rehire rules by unchecking the setting, or maintain respecting the 13- or 26-week rules as indicated using the radio button selection. By unchecking the setting, rehires will always be considered as an ongoing employee rather than a new employee on return.

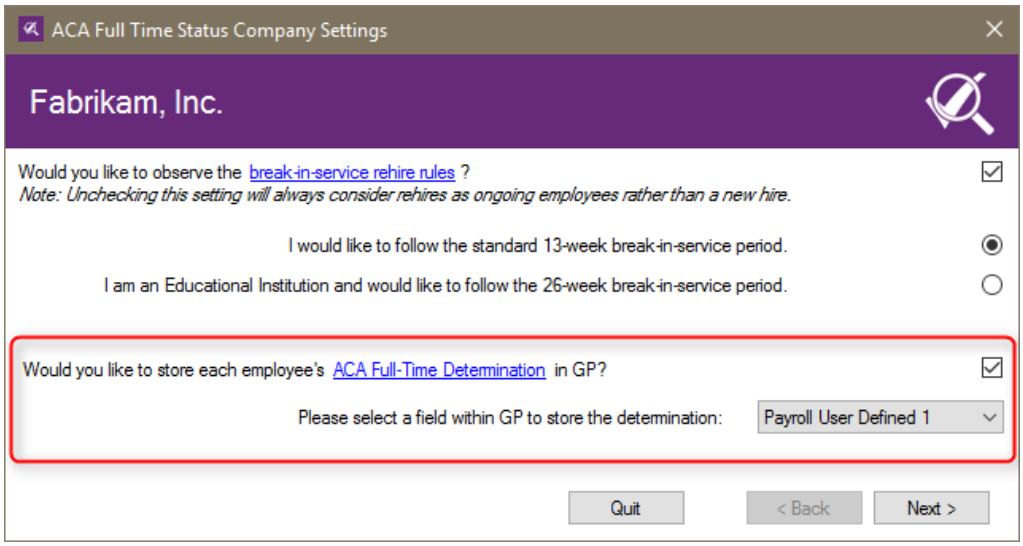
By default, the Payroll Inspector will continue using the 13-week rule or 26-week rule (if previously set), unless the user chooses to manually disable the setting.



2.1.2.2. Storing employees' ACA Full-Time Determination in GP

The ACA Full-Time Determination setting is an optional field, that previously may have been viewed as required within the settings workflow. If the setting

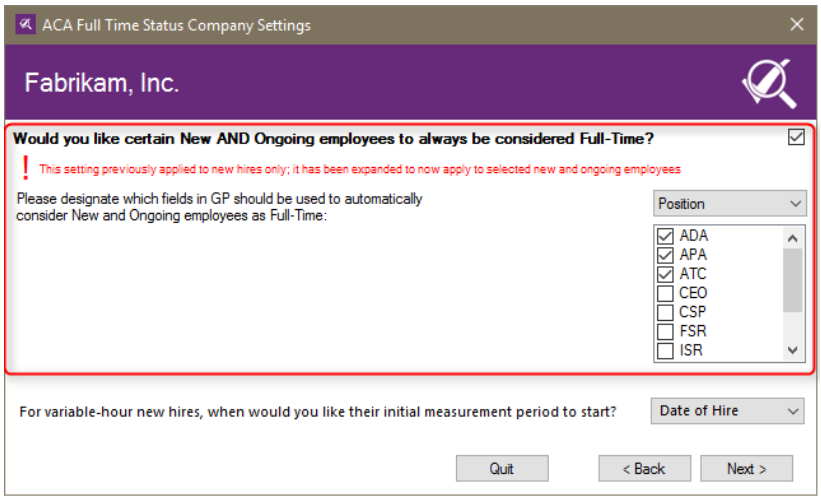
had a field selected previously, we will maintain storing determinations to that specified field in GP, otherwise this setting will be unchecked as the “Do Not Store” option.



2.1.2.3. New and Ongoing Employees Automatically considered Full-Time

This setting previously only applied to New Employees. It will now apply to any New *and* Ongoing employees included in the selected GP field(s). These employees will be determined as automatically Full-Time without calculating their actual hours worked during a given measurement period. Their hours breakdown will still be available for review (see section 2.2.3), however as long as they are included in this settings, will be considered always full-time.

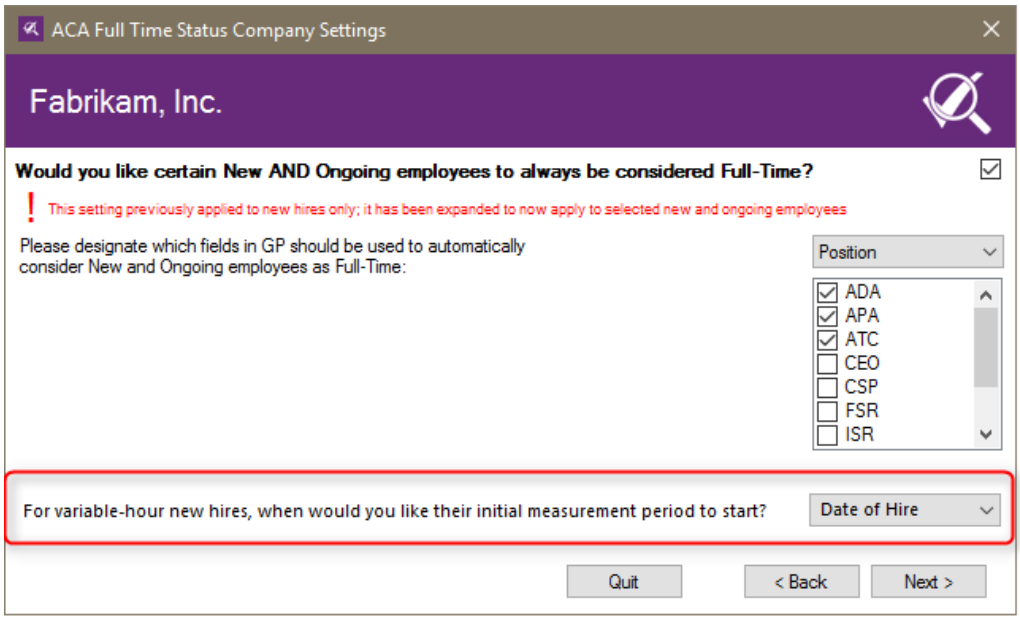
Fields for ‘Position’ and ‘Department’ were also added to the drop-down list of options to choose from.



2.1.2.4. New Hire Initial Measurement Period Start

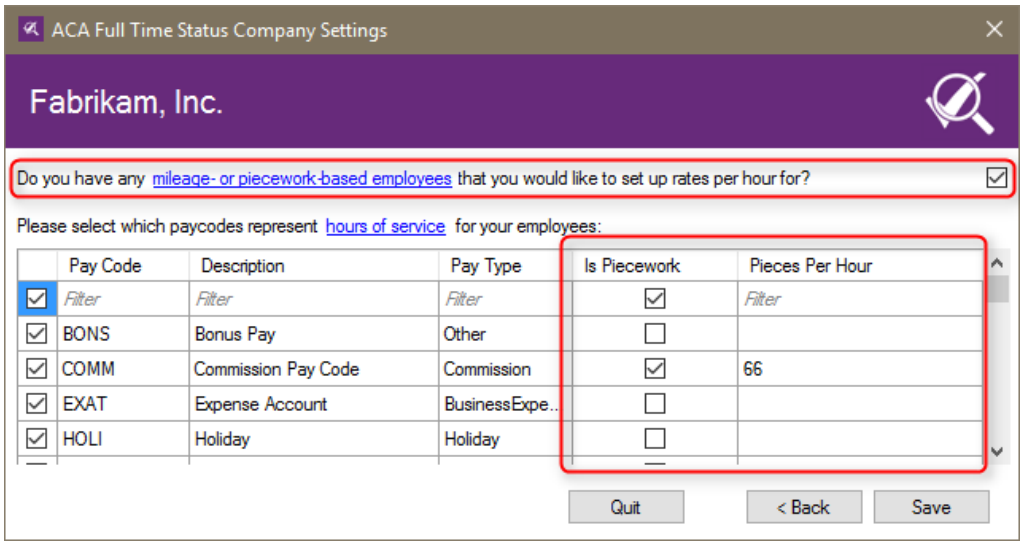
The options for determining when the new hire initial measurement period begins, remain the same:

- Date of Hire
- Nearest 1st of Month
- Adjusted Date of Hire
- Nearest 1st of Month (Adj)



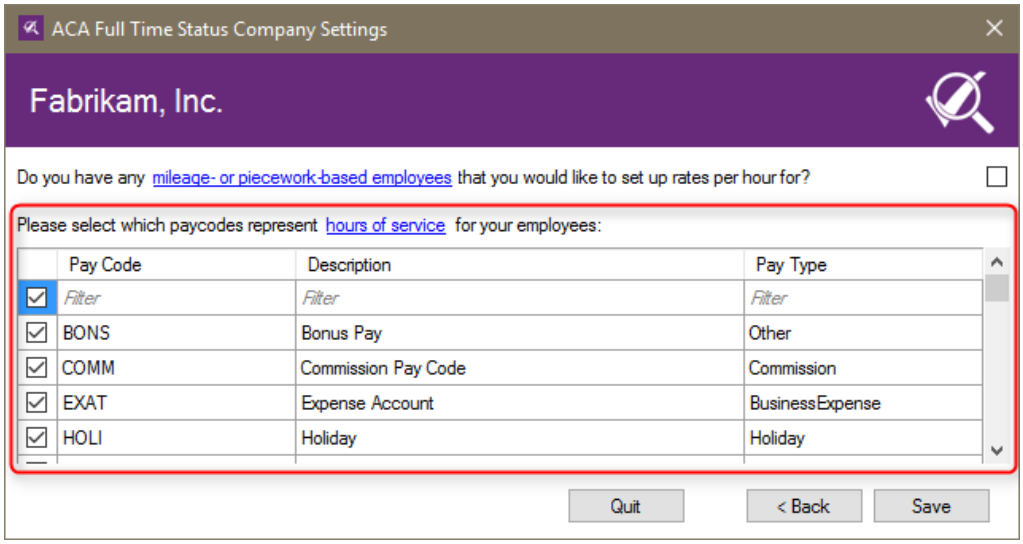
2.1.2.5. Mileage- or Piecework-based Employees

There are no changes to the Mileage-/Piecework-based setting. The user will still indicate if there are any pay codes to account for mileage- or piecework-based employees by checking the checkbox for the setting, which will then give two additional columns within the pay code selection grid for set up.



2.1.2.6. Pay Codes towards Hours Worked

There are no changes to the grid to select which pay codes should be included towards hours worked for employees, nor any changes to how average hours worked during a measurement period are calculated using these codes.

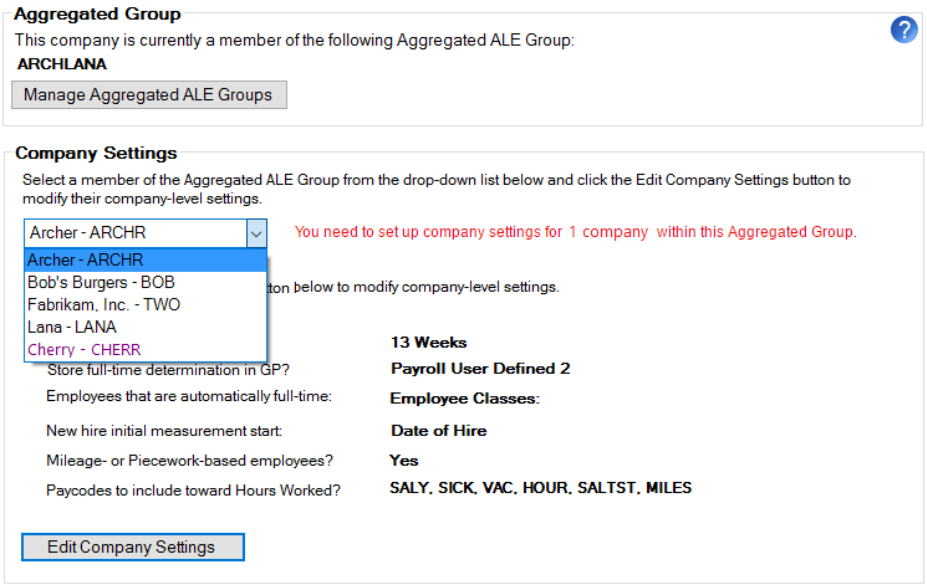


2.1.2.7. Aggregated ALE Group Member Consideration

Companies that are included in an Aggregated ALE Group will need to set up these company-level settings contained in the Company Settings wizard for each company included in the Aggregated ALE Group.

To assist in this process, the user may toggle between aggregated ALE group members/companies from one company's setting page to set these company-level setting for each company, rather than having to fully switch into the company within the Payroll Inspector.

All companies included in the Aggregated ALE Group will appear in the drop-down list within the Company Settings section. The company settings for the selected company will appear within the section. If Payroll Inspector detects that a company has not set up their company settings, it will alert the user within this section and the company will display as purple within the drop-down list.

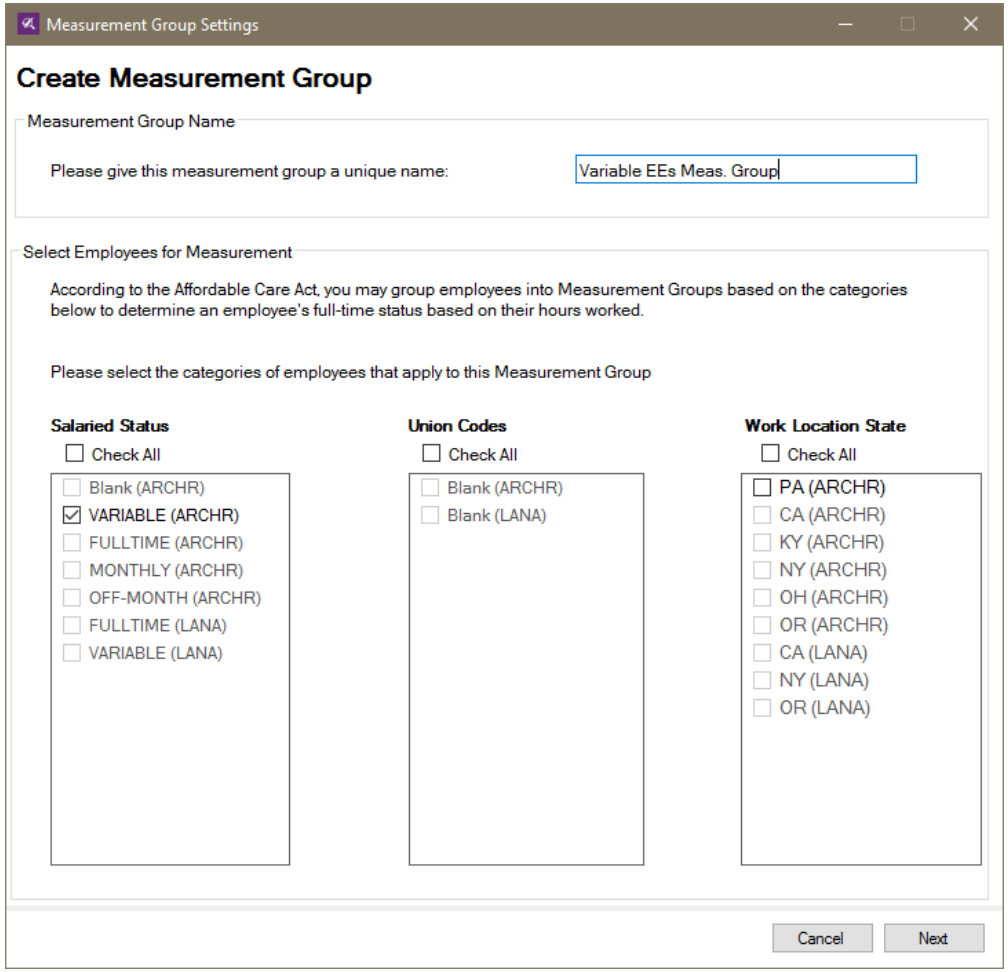


2.1.3. Measurement Groups

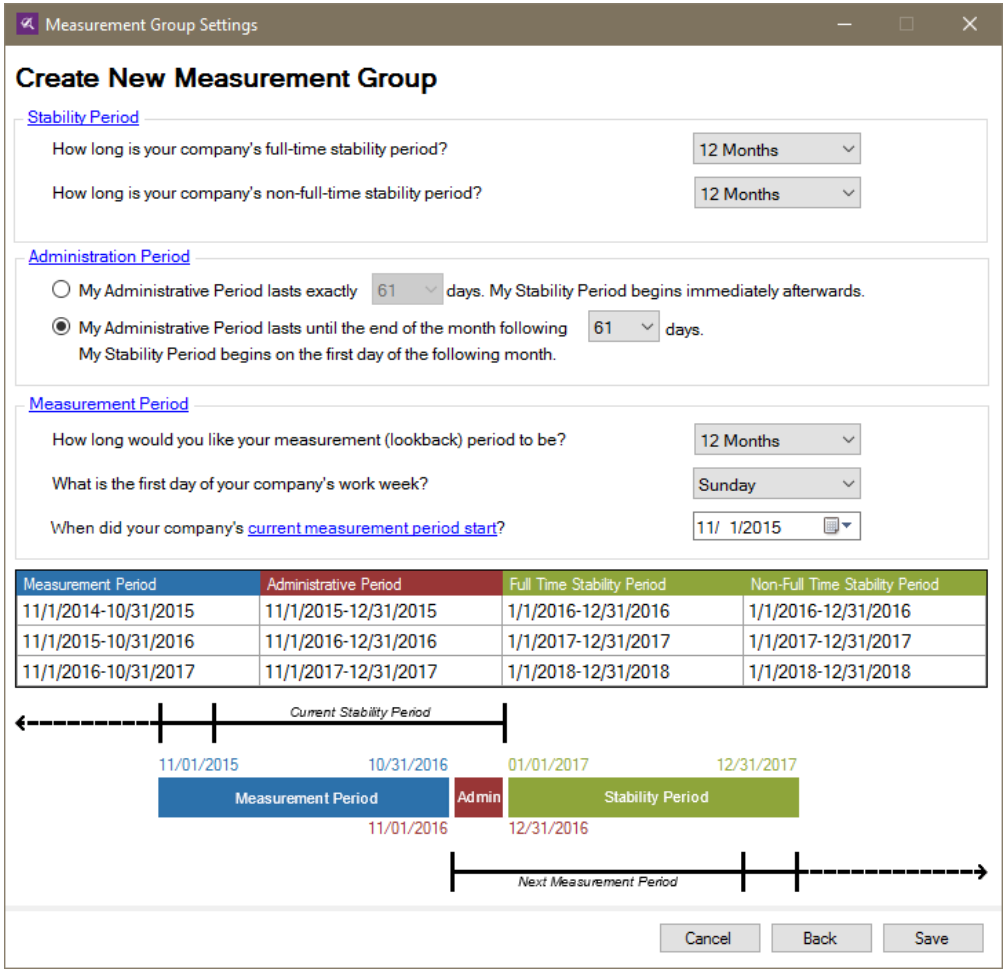
Measurement Group setups have remained virtually the same. If the company is an Aggregated ALE Group, measurement groups will continue to be set up at the aggregated level.

The biggest difference is that there are now two steps to this wizard to break-up the employee selection section from the measurement group date inputs. The 2nd step allows the user to see a visual breakdown of the previous, current, and next measurement periods based on these inputs.

Measurement Group Wizard Step 1



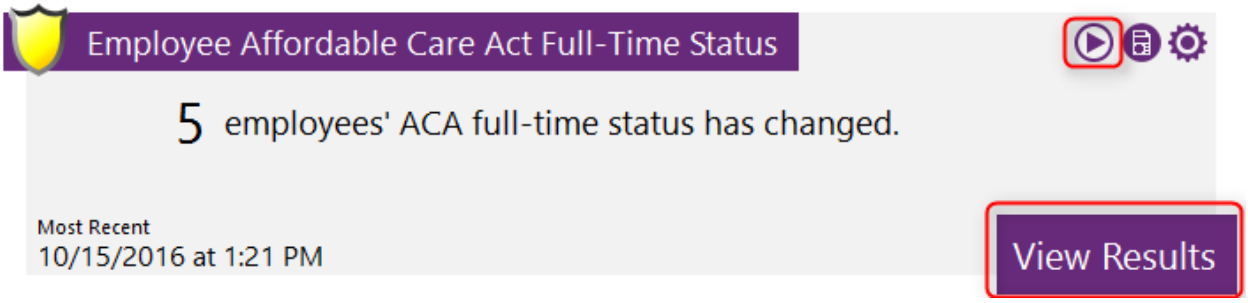
Measurement Group Wizard Step 2



2.2. Results: ACA Full-Time Status widget

The user will continue to run the Employee ACA Full-Time Status widget by clicking the play icon in the top right corner of the widget.

Users will now be able to View Results through the button, in the lower right corner of the widget, for the Full-Time Status results even if there are no issues or status changes that need to be reviewed.



2.2.1. Full-Time Status Results Dashboard

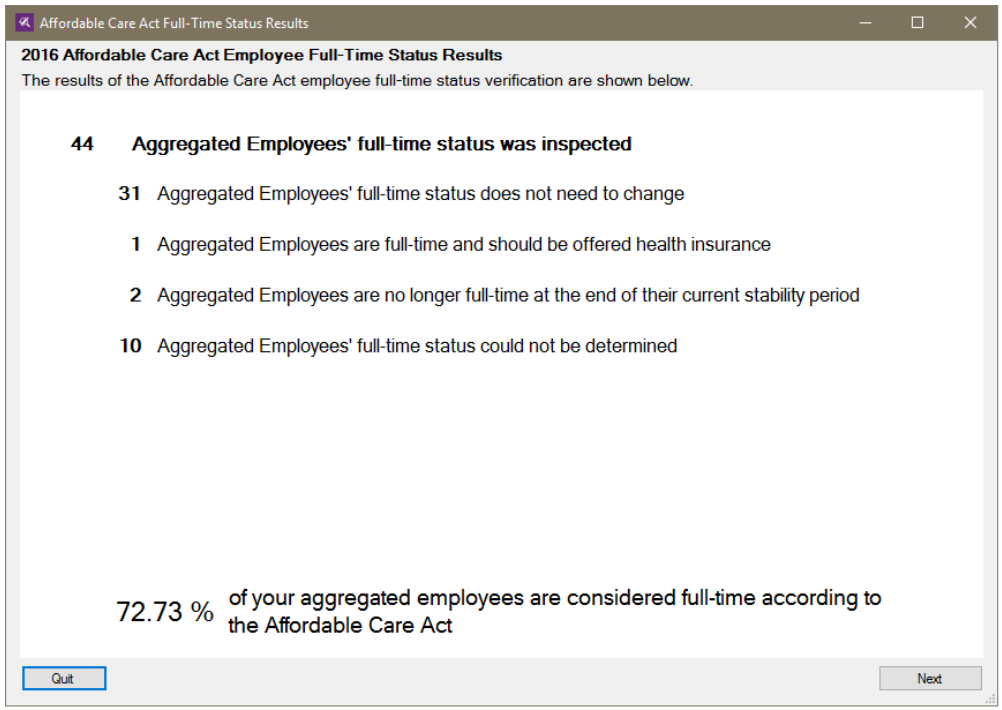
Upon clicking the “View Results” button, the user will be presented with an updated dashboard for results. This dashboard contains certain quick links that admins may be particularly interested in to work through their results or in resolving issues. The user may click to View All Results or click one of the dashboard options to view a pre-filtered results list.

The dashboard also includes Upcoming Action Items that can assist users in forecasting for upcoming measurement periods.

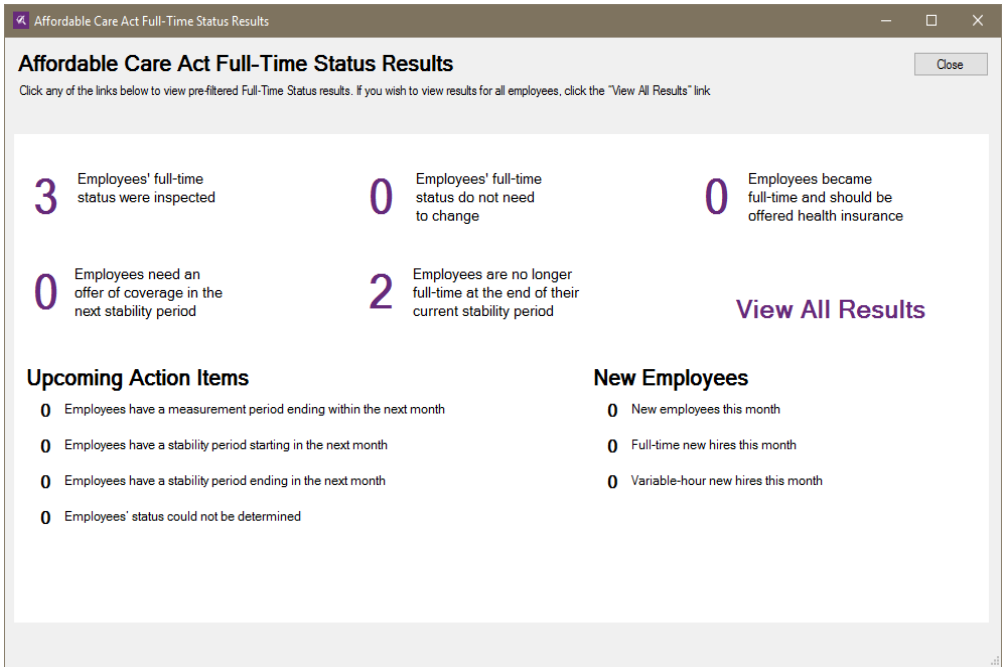
As is current functionality, if a company is set up as a member of an Aggregated ALE Group, the dashboard results will reflect those of the entire Aggregated ALE Group.

Let’s take a look at what has changed with the results dashboard and the items the user can expect to see. The following page shows a comparison of the previous dashboard and the new dashboard screens.

Previous Full-Time Results Dashboard



New Full-Time Results Dashboard



2.2.2. Full-Time Status Results Grid and Reporting

“View All Results” from the dashboard will launch the user into a new grid view for filtering employees and managing status changes.

The new view allows the user to quickly filter based on:

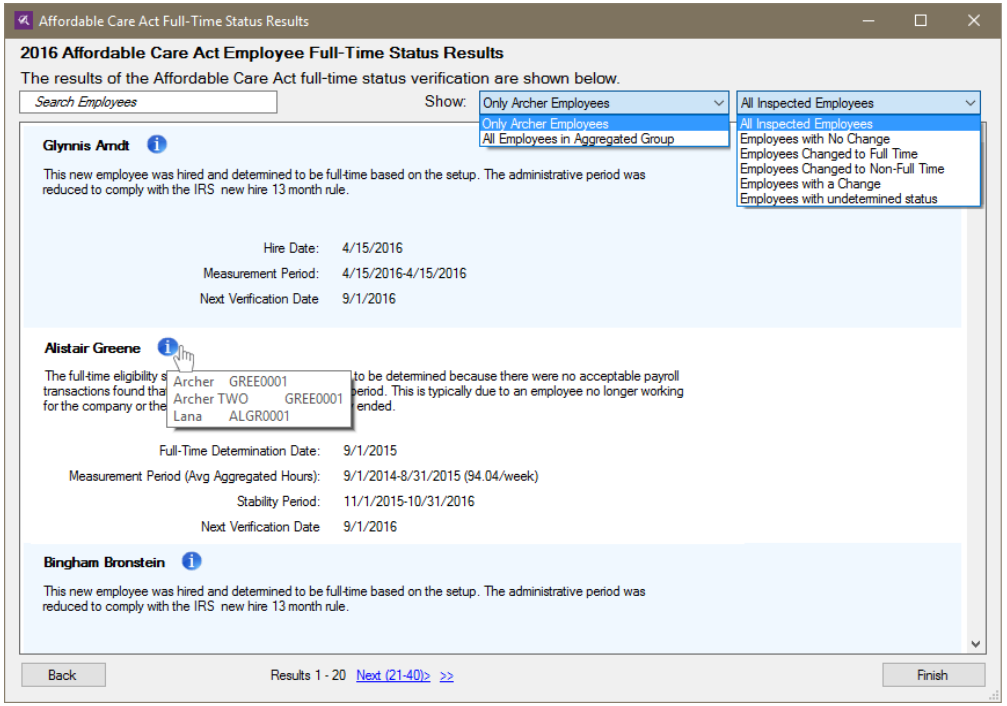
- Employee data (Employee ID, First Name, Last Name)
- Current Change in Status
- Measurement Period dates
- Hours per Week worked within the given measurement period
- Stability Period dates
- Full-Time Status Determination for the given stability period

The user may also review an expanded view for an employee if the Payroll Inspector detects more than one measurement period worth of data for the employee.

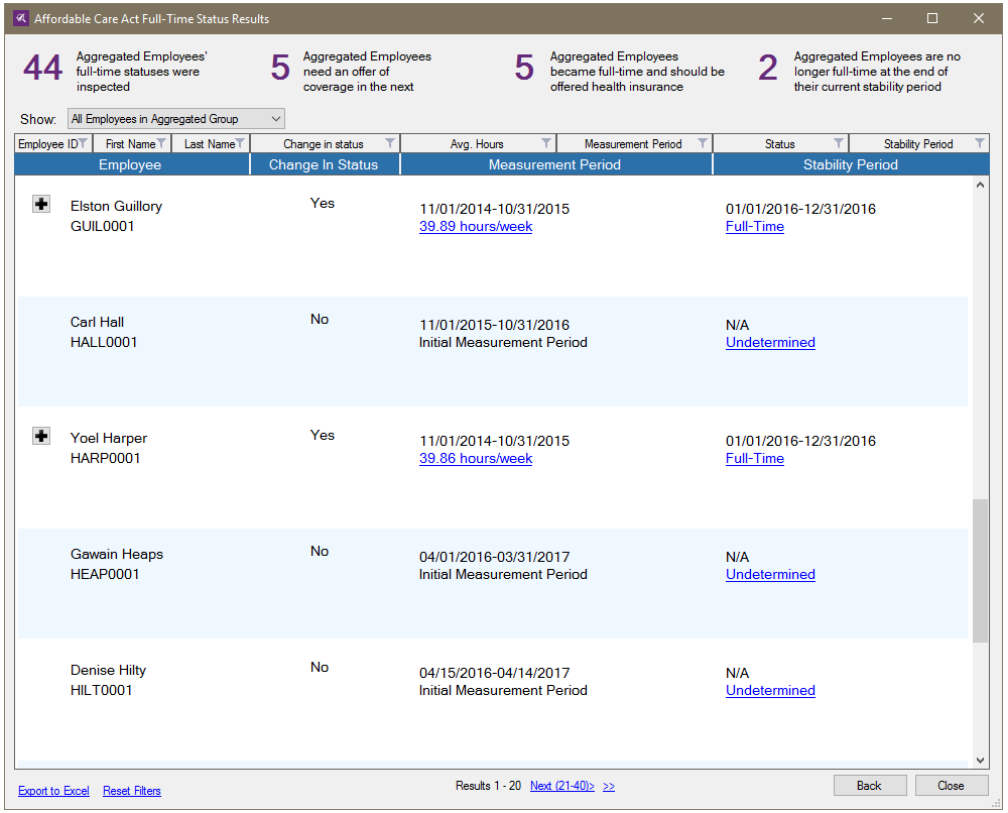
Based on the results displayed in the grid (either all results or a filtered set), a user may export and download an excel report of the data to further review. This will essentially allow the user to create a custom report including any of the determination elements.

Let’s take a look at what has changed with the results details. The following page shows a comparison of the previous results details and the new results reporting grid.

Previous Full-Time Results Details



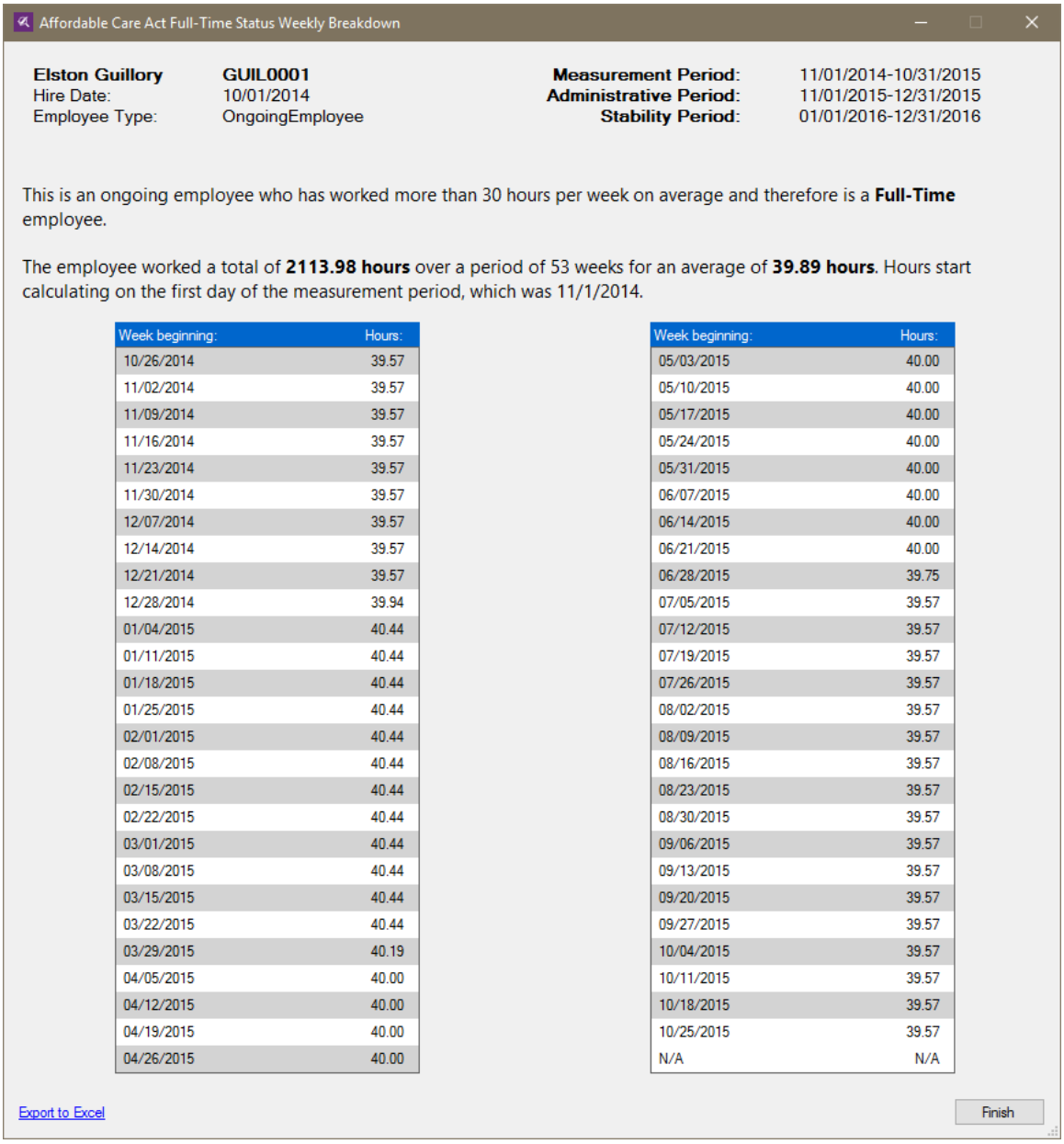
New Full-Time Results Reporting Grid



2.2.3. Hours Worked per Week Breakdown

The Hour/Week Breakdown is a new feature for the Full-Time Status Results. For each measurement period found for each employee, the user may click on the hours/week displayed within the grid and view a detailed breakdown of the hours worked per week during the given the measurement period with additional details, some based on set up including pay codes for calculation, for why an employee is determined a certain way.

This report may also be exported to an excel download.



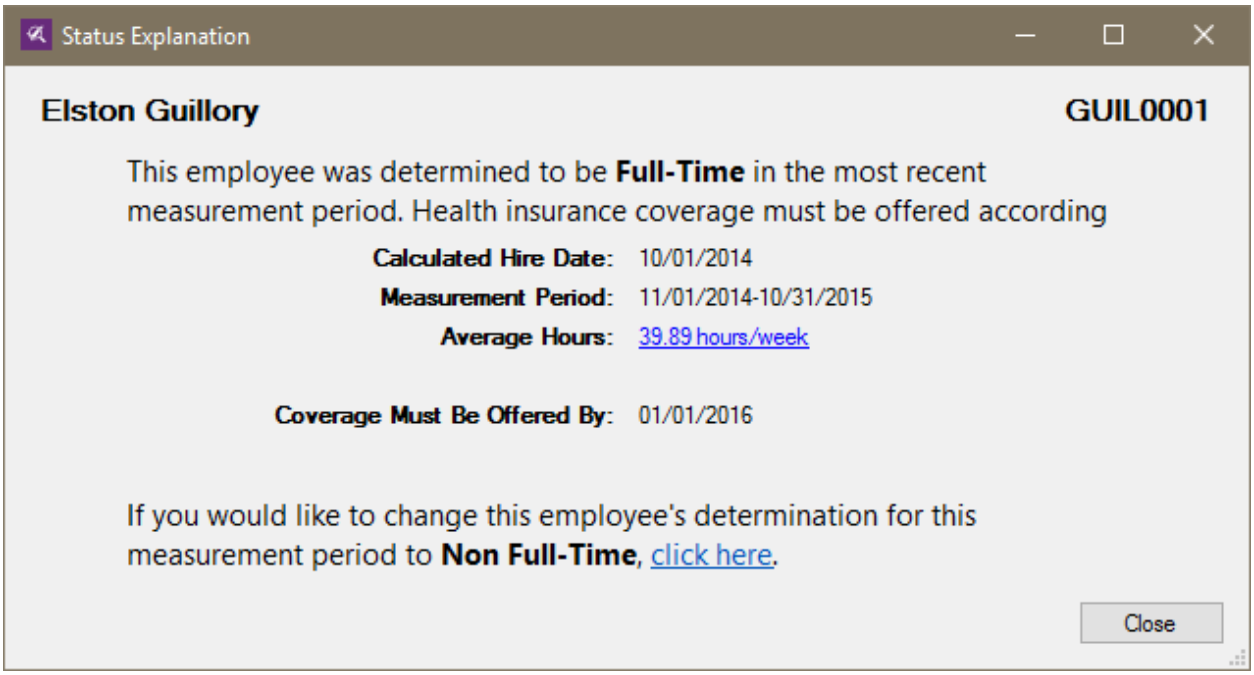
Week beginning:	Hours:
10/26/2014	39.57
11/02/2014	39.57
11/09/2014	39.57
11/16/2014	39.57
11/23/2014	39.57
11/30/2014	39.57
12/07/2014	39.57
12/14/2014	39.57
12/21/2014	39.57
12/28/2014	39.94
01/04/2015	40.44
01/11/2015	40.44
01/18/2015	40.44
01/25/2015	40.44
02/01/2015	40.44
02/08/2015	40.44
02/15/2015	40.44
02/22/2015	40.44
03/01/2015	40.44
03/08/2015	40.44
03/15/2015	40.44
03/22/2015	40.44
03/29/2015	40.19
04/05/2015	40.00
04/12/2015	40.00
04/19/2015	40.00
04/26/2015	40.00

Week beginning:	Hours:
05/03/2015	40.00
05/10/2015	40.00
05/17/2015	40.00
05/24/2015	40.00
05/31/2015	40.00
06/07/2015	40.00
06/14/2015	40.00
06/21/2015	40.00
06/28/2015	39.75
07/05/2015	39.57
07/12/2015	39.57
07/19/2015	39.57
07/26/2015	39.57
08/02/2015	39.57
08/09/2015	39.57
08/16/2015	39.57
08/23/2015	39.57
08/30/2015	39.57
09/06/2015	39.57
09/13/2015	39.57
09/20/2015	39.57
09/27/2015	39.57
10/04/2015	39.57
10/11/2015	39.57
10/18/2015	39.57
10/25/2015	39.57
N/A	N/A

2.2.4. Status Explanation and Updating/Change Capability

Previously within the results, the user was able to Ignore a Change of Status or Update the Change back to GP. This is now taken care of through the Status Explanation screen, accessible by clicking on the Status Determination (Full-Time, Non Full-Time, Undetermined) link within the Stability Period column for a given measurement period.

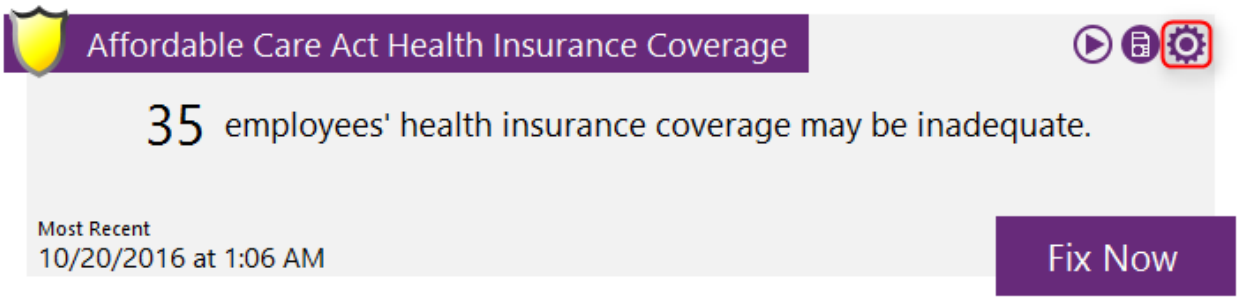
The user will then be given more details regarding the employee's status determination and will have the ability to revert a suggested status change back. If it is not manually reverted, the change will then sync to GP, if the setting is enabled and indicated within the Company Settings (2.1.2.2), when the results are closed.



3. Employee ACA Coverage Widget

3.1. Settings: ACA Coverage widget

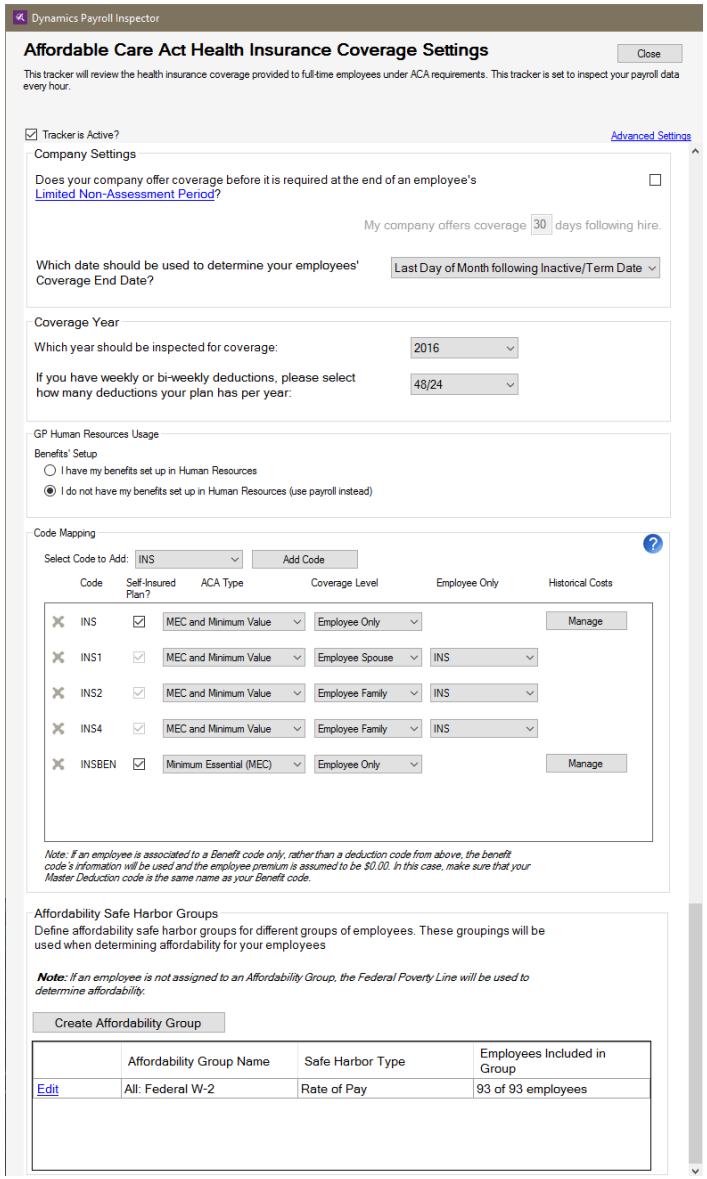
The ACA Coverage widget settings are still accessible through the gear icon in the top right corner of the widget.



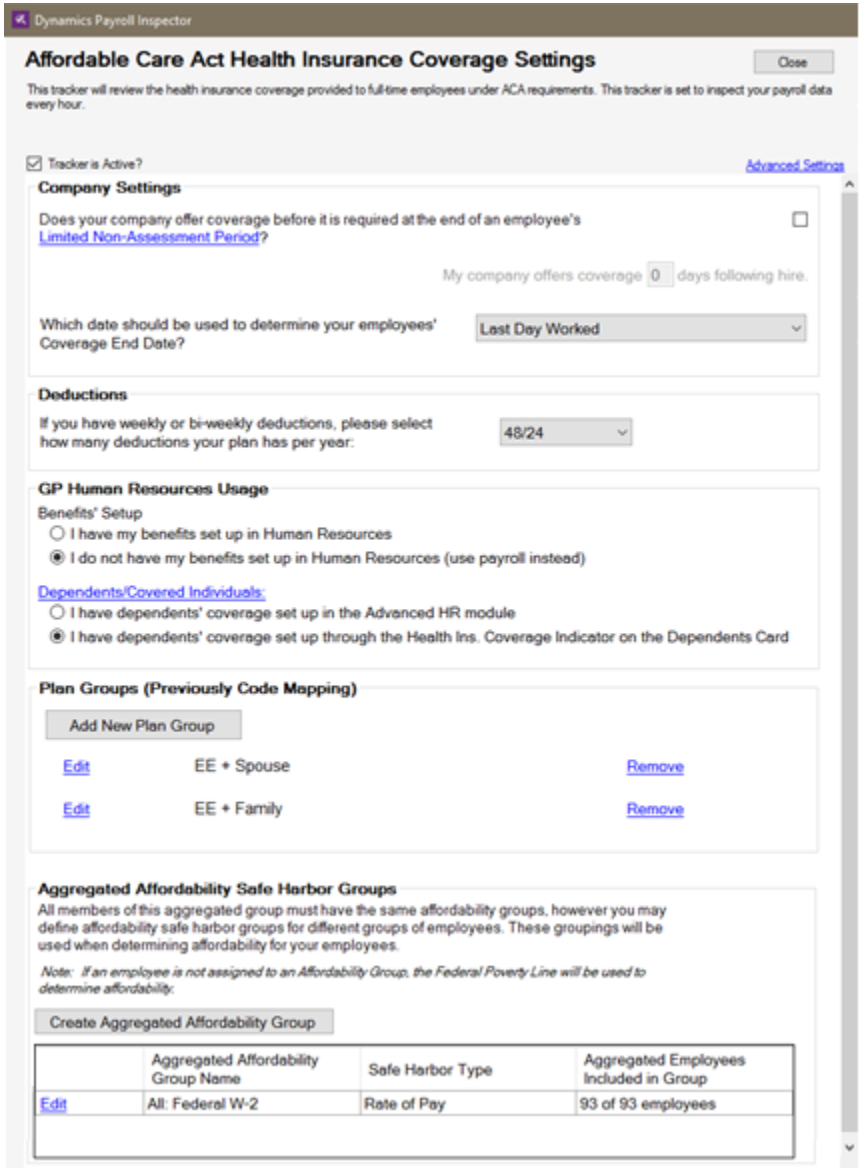
Once the user accesses the settings screen, it should look very familiar, as not too much has changed here visually, but there are some key differences to note.

Let's take a look at what has changed with the Coverage Settings. The following page shows a comparison of the previous settings and the new settings screens.

Previous Coverage Settings Screen



New Coverage Settings Screen



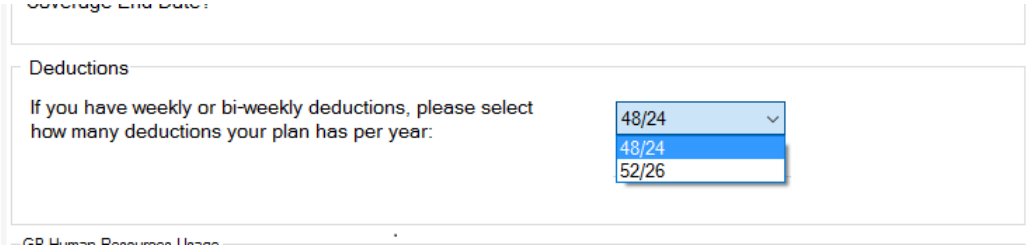
3.1.1. Company Settings

There are no changes to the Company Settings section, which includes the following two settings:

- *Does your company offer coverage before it is required at the end of an employee's Limited Non-Assessment Period?*
- *Which date should be used to determine your employees' Coverage End Date?*

3.1.2. Deductions

As we will detail later in the new Coverage Results Grid (3.2.2.1), the Coverage Year indication may now be toggled through a drop-down list at the top of the Coverage Results Grid. Therefore, this section within the main settings has been updated to reflect the remaining setting for the weekly/bi-weekly deductions selection.



3.1.3. GP Human Resources Usage

There are no changes to the GP Human Resources Usage section.

3.1.4. Plan Groups *(Previously Code Mapping)*

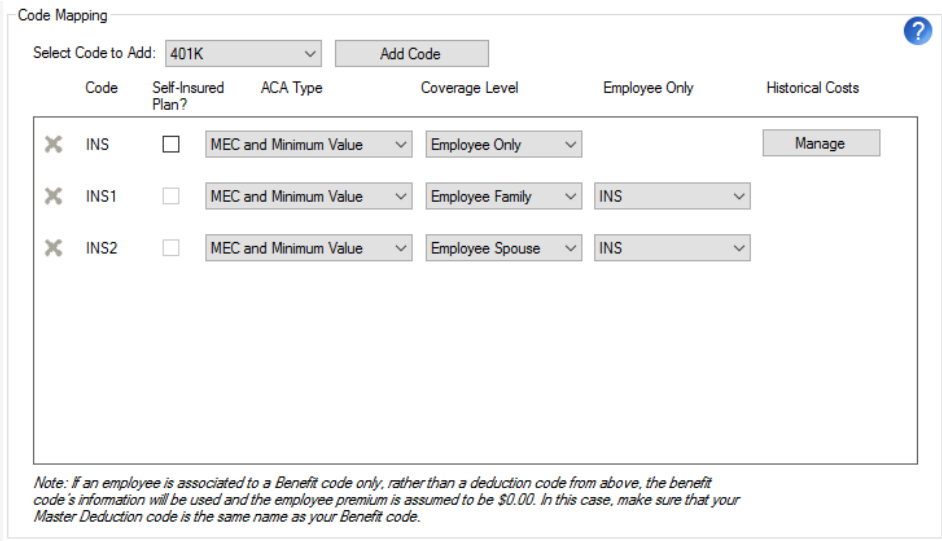
The new Plan Groups section is replacing the previous Code Mapping setup section. All existing code mappings have been retained, however they are now bundled into Plan Groups, which are tied to the Employee Only coverage level code/plan, that subsequent codes were linked to previously, and named as such.

All settings have been retained, but moved into a more comprehensible wizard workflow for setting up a new Plan Group and editing an existing Plan Group. Each of the wizard steps/pages will be detailed below.

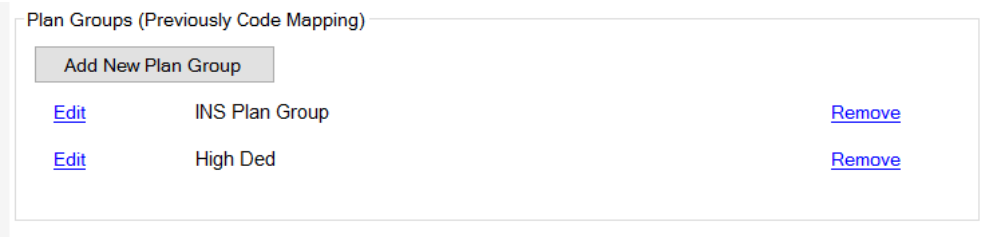
A new setting was added to the Code Mapping/Plan Group setup for automatically determining certain employees as receiving the Plan Group Offer is notated in bold below for section 3.1.4.4.

See below for a comparison of the main settings section.

Previous Code Mapping Setup Section



New Plan Groups Setup Section

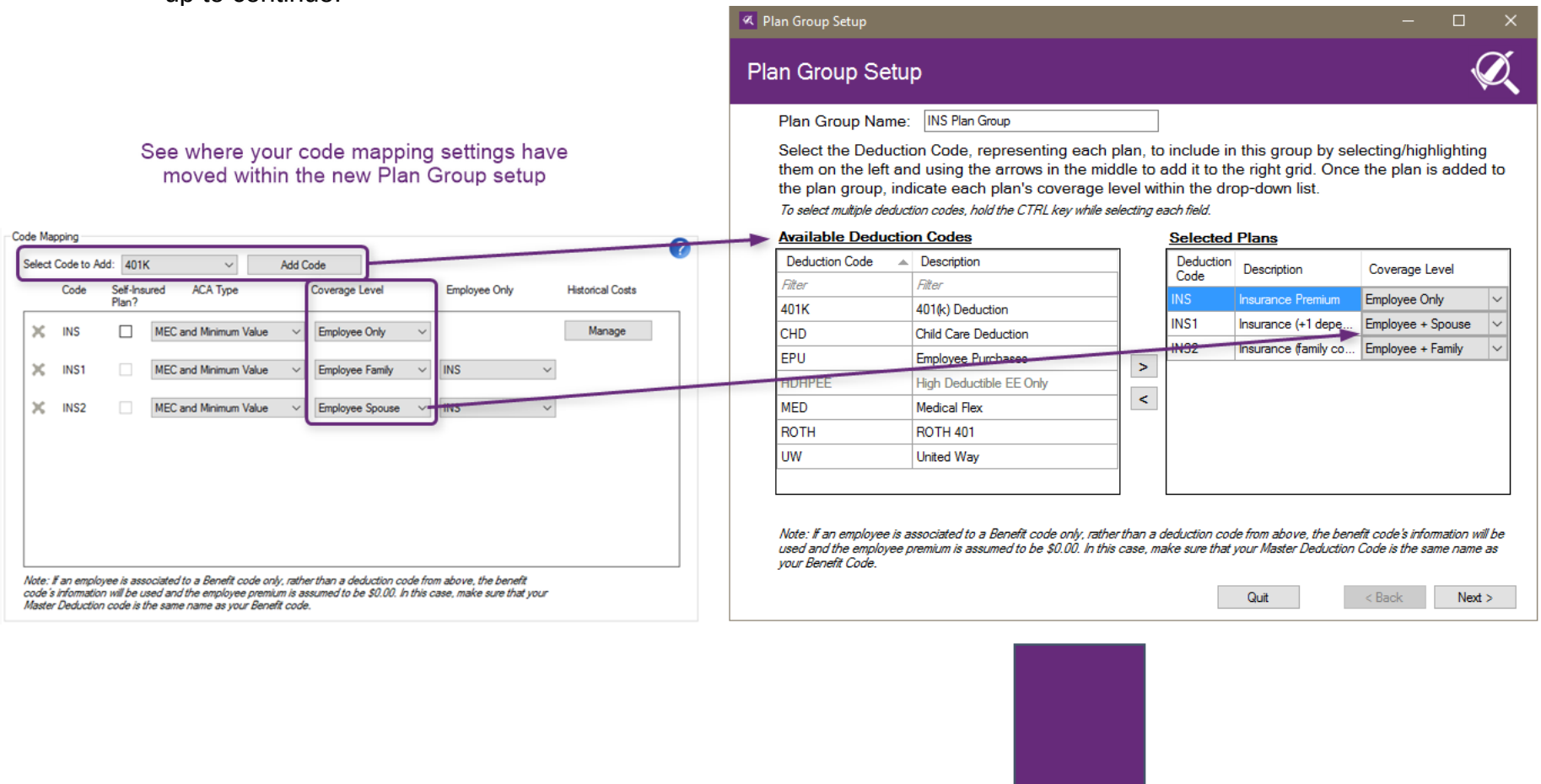


3.1.4.1. Plan Group Wizard Step 1: Name & Plan Selections

Each Plan Group must be set up with a unique name to identify it and will be set within this first step of the wizard. This is the name that will be displayed within the main settings section for quick reference.

All Available Deduction or Benefit codes (depending on if the company uses GP Payroll or HR) will be displayed in the left grid. If a code has already been included in a different Plan Group, it will be greyed and unavailable to select.

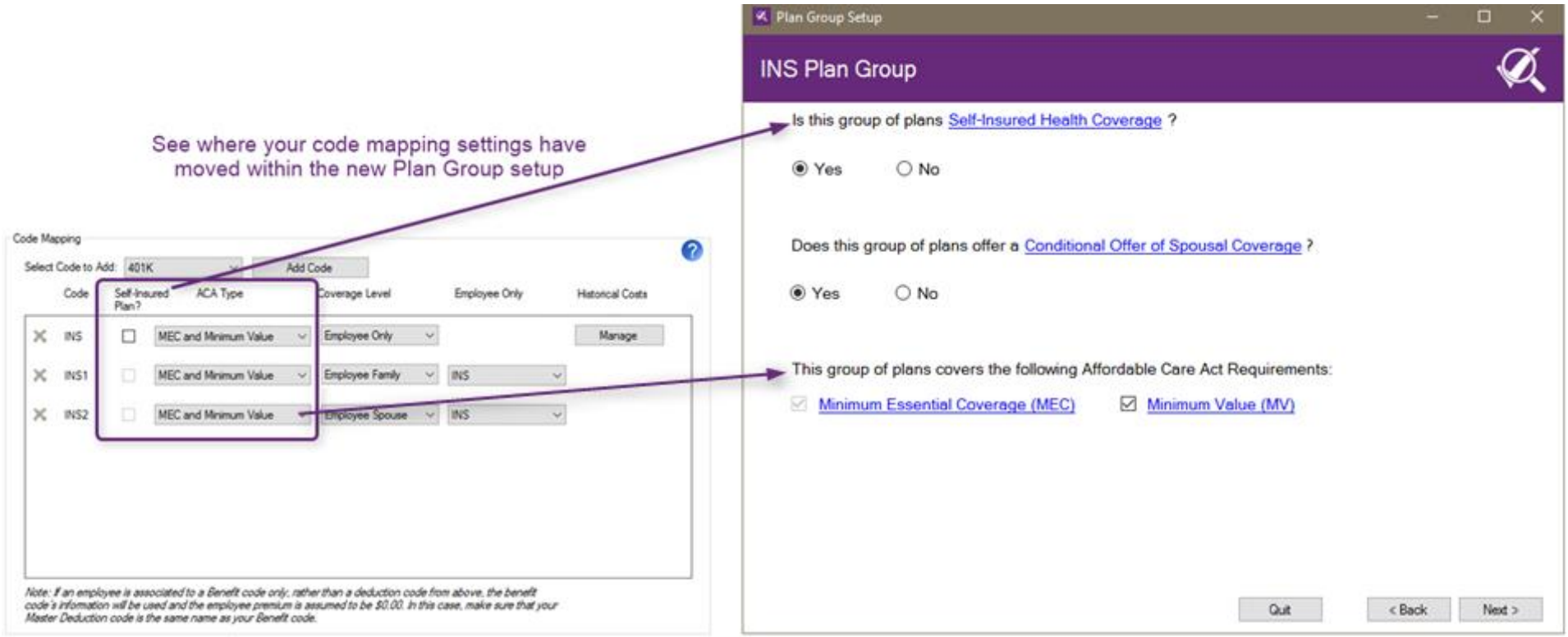
Choose the codes/plans to include in the Plan Group and, using the arrows in the center, move it into the right grid. For each selected plan, indicate a coverage level. Each Plan Group must have an Employee Only plan set up to continue.



3.1.4.2. Plan Group Wizard Step 2: Self-Insured and ACA Requirements Indication

The following two settings are being maintained and applies to all plans/coverage levels within the Plan Group.

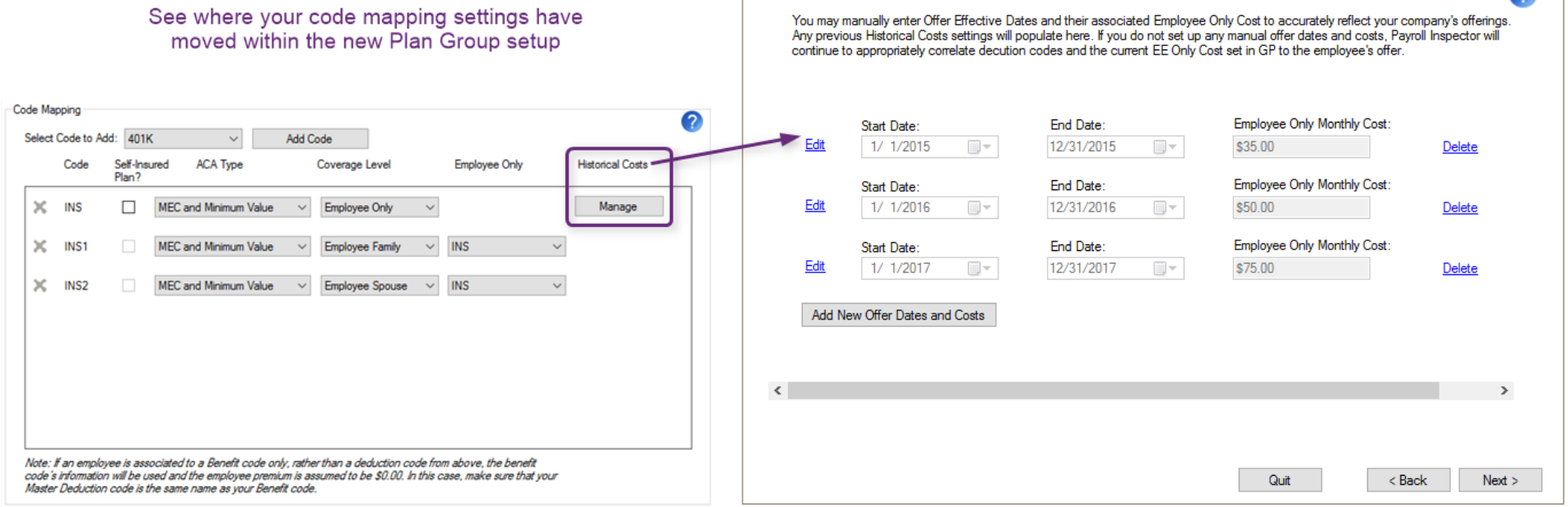
- Indicate Yes or No for whether this group of plans are for Self-Insured Health Coverage
- Indicate Yes or No for whether this group of plans offers a Conditional Offer of Spousal Coverage
- Indicate if this group of plans qualify as Minimum Essential Coverage (MEC) and/or Minimum Value (MV)
  It is important to note that a group of plans cannot be MV without being MEC, but can be MEC and not MV.



3.1.4.3. Plan Group Wizard Step 3: Offer Effective Dates and Costs

This step accounts for the previous Historical Monthly Costs Management setup. The user may continue to set up and manage employee only monthly historical costs for a particular Plan Group. The user may set up as many historical date ranges and costs as necessary to manually override the default cost being pulled from GP.

An expanded explanation of how to manage this page is accessible through the icon in the upper right-hand corner of the window.



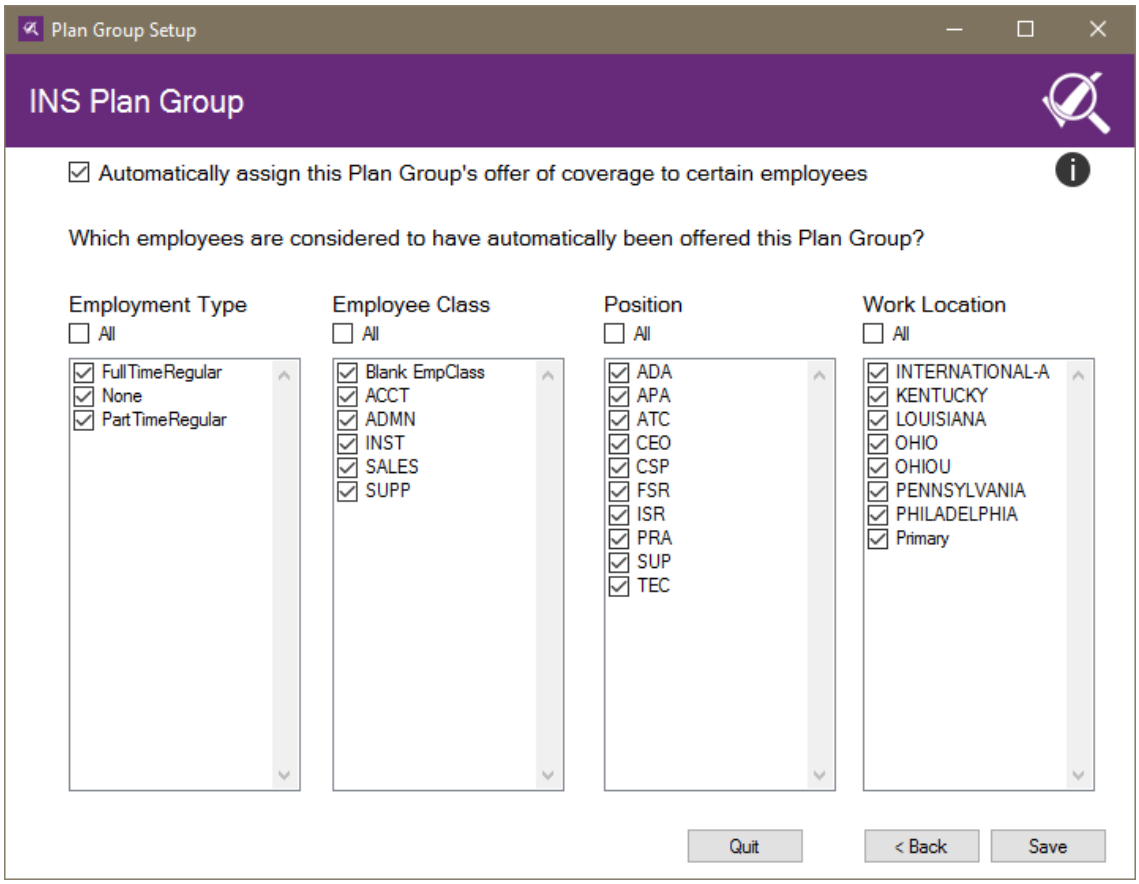
3.1.4.4. Plan Group Wizard Step 4: Auto Assigning an Offer of Coverage to Employees

New Setting:

This new setting allows the admin to manually set certain groups of employees as being assumed to have been offered coverage for this group of plans.

This setting is beneficial if the company does not have full offer details and/or deduction/benefit codes properly assigned to employees in GP. Employees may be included in multiple Plan Groups since they may be offered several different groups of plans to choose from.

Choosing to manually include an employee a Plan Group will not override any other Plan Group that they may be included in due to benefit/deduction code assignments in GP. Assigning these manual offers will not sync back to GP, rather just be used for generating accurate 1095-C reporting in the Payroll Inspector.



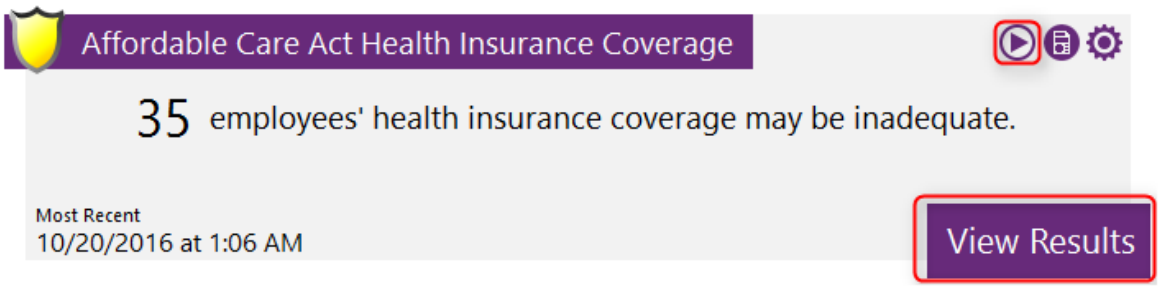
3.1.5. Affordability Groups

There are no changes to how Affordability Groups are set up.

3.2. Results: ACA Coverage widget

The user will continue to run the ACA Coverage widget by clicking the play icon in the top right corner of the widget.

Users will now be able to View Results through the button, in the lower right corner of the widget, for the Coverage results even if there are no issues that need to be reviewed and addressed.



3.2.1. Coverage Results Dashboard

Upon clicking the “View Results” button, the user will be presented with an updated dashboard for results. This dashboard contains certain quick links that admins may be particularly interested in to work through their results or in resolving issues. The user may click to View All Results or click one of the dashboard options to view a pre-filtered results list. Red or Orange dashboard items may indicate an issue that needs to be reviewed.

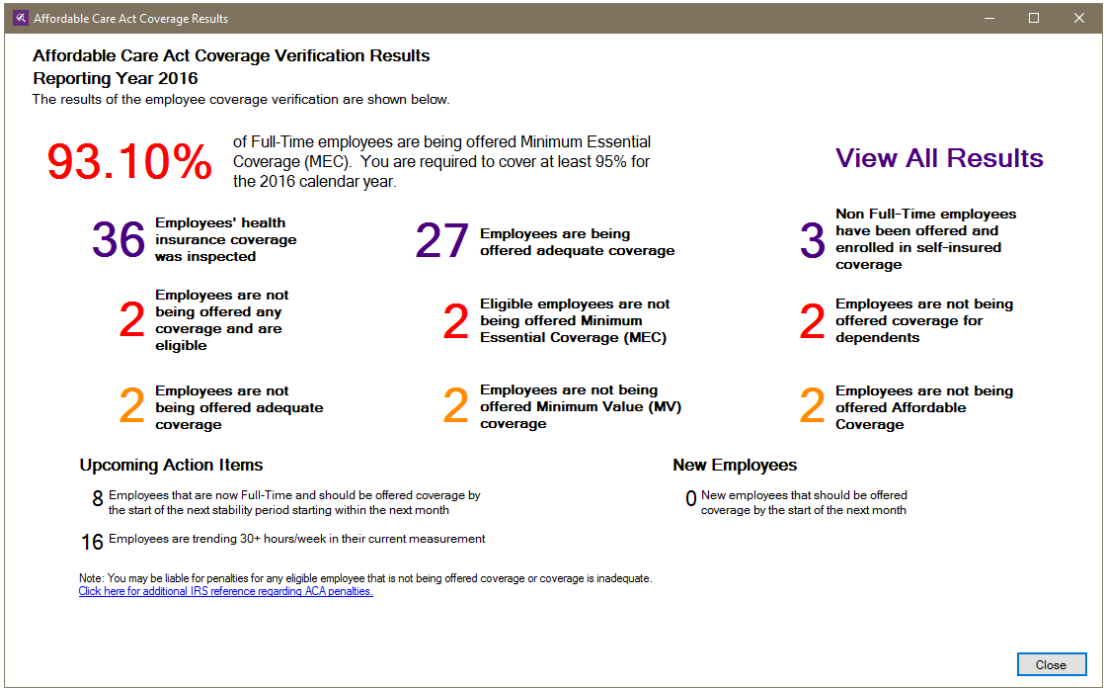
The dashboard also includes some Upcoming Action Item excel reports that can assist users in forecasting for upcoming employees who should or may need to be offered coverage.

As is current functionality, if a company is set up as a member of an Aggregated ALE Group, the dashboard results will reflect those of the entire Aggregated ALE Group.

Let’s take a look at what has changed with the results dashboard and the items the user can expect to see. The following page shows a comparison of the previous dashboard and the new dashboard screens.

Previous Coverage Results Dashboard

New Coverage Results Dashboard



3.2.2. Coverage Results Grid and Reporting

“View All Results” from the dashboard will launch the user into a new grid view for filtering employees and managing their offer of coverage determinations.

The new view allows the user to quickly filter based on:

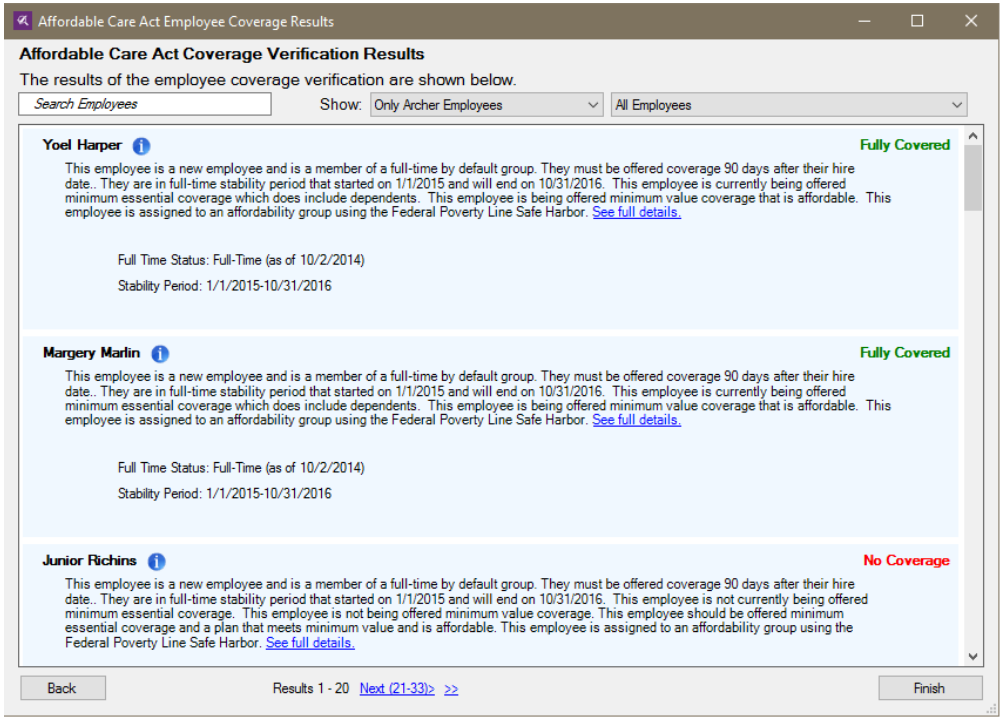
- Employee data (Employee ID, First Name, Last Name)
- Offer Determination
- Line 14 Codes
- Line 16 Codes
- Affordability status
- Minimum Essential Coverage status
- Minimum Value status
- Dependents Offer of Coverage status
- Self-Insured indication
- Enrolled/Waived Status

The user may also review an expanded view for each employee’s 1095-C Part II breakdown of Lines 14-16 information.

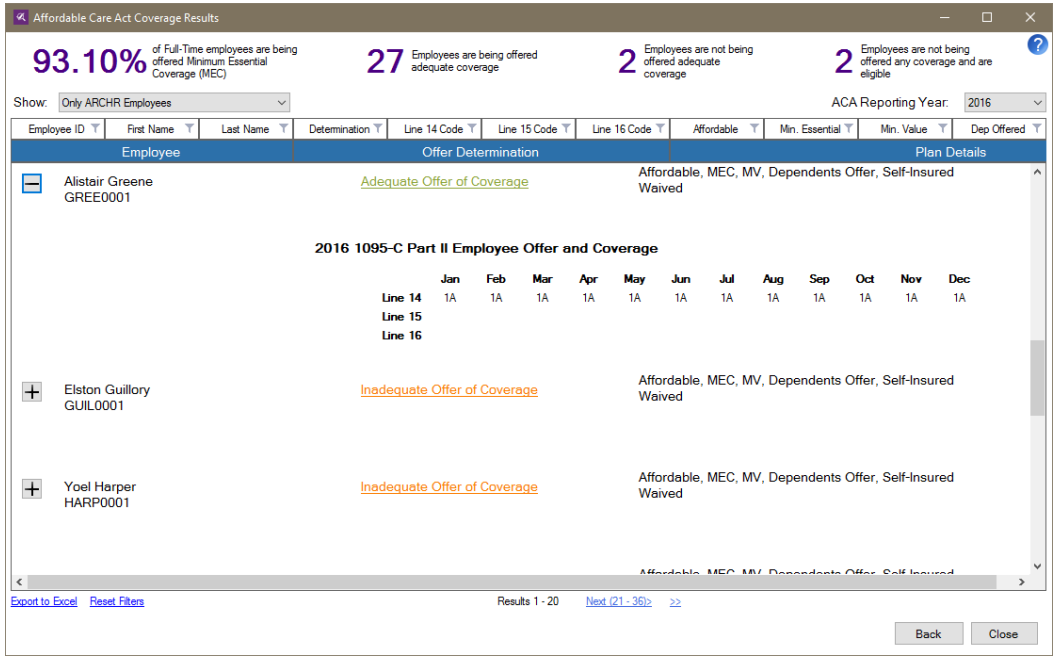
Based on the results displayed in the grid (either all results or a filtered set), a user may export and download an excel report of the data to further review. This will essentially allow the user to create a custom report including any of the determination elements.

Let’s take a look at what has changed with the results details. The following page shows a comparison of the previous results details and the new results reporting grid.

Previous Coverage Results Details

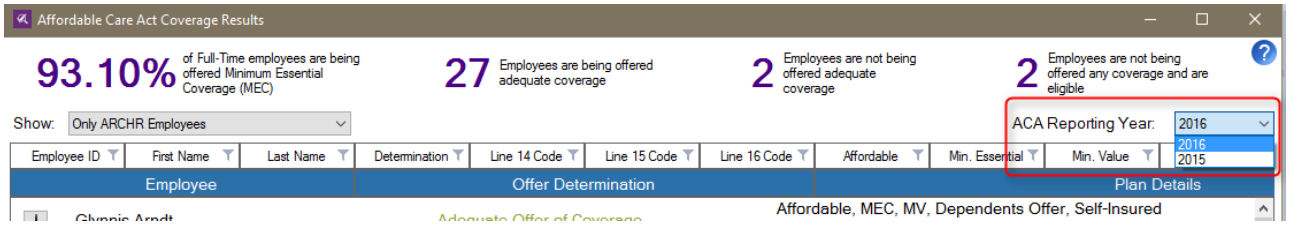


New Coverage Results Reporting Grid



3.2.2.1. ACA Reporting Year

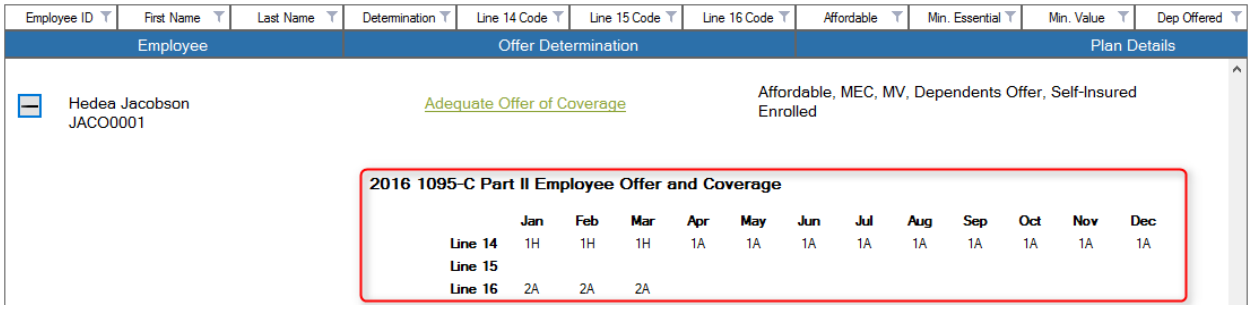
The ACA Reporting Year was previously located in the main settings as the Coverage Year to be inspected setting. The user may now toggle between current and previous year to review ACA Coverage Results and 1095-C data per employee.



3.2.2.2. Expanded State: 1095-C Part II

When an employee's row is expanded, their 1095-C Part II, Lines 14-16 displays. Any months that have elapsed for the chosen ACA Reporting Year will be displayed here. It is important to note that there are certain scenarios where an employee may have a blank Line 15 amount or Line 16 and it will be displayed as such accordingly.

If an employee was not required to be offered coverage and thus was not offered coverage, their 1095-C Part II display may be blank for all or specified months when there was no required offer extended. This may not indicate an issue to be resolved, however the section will still display.



3.2.3. Employee Coverage Details

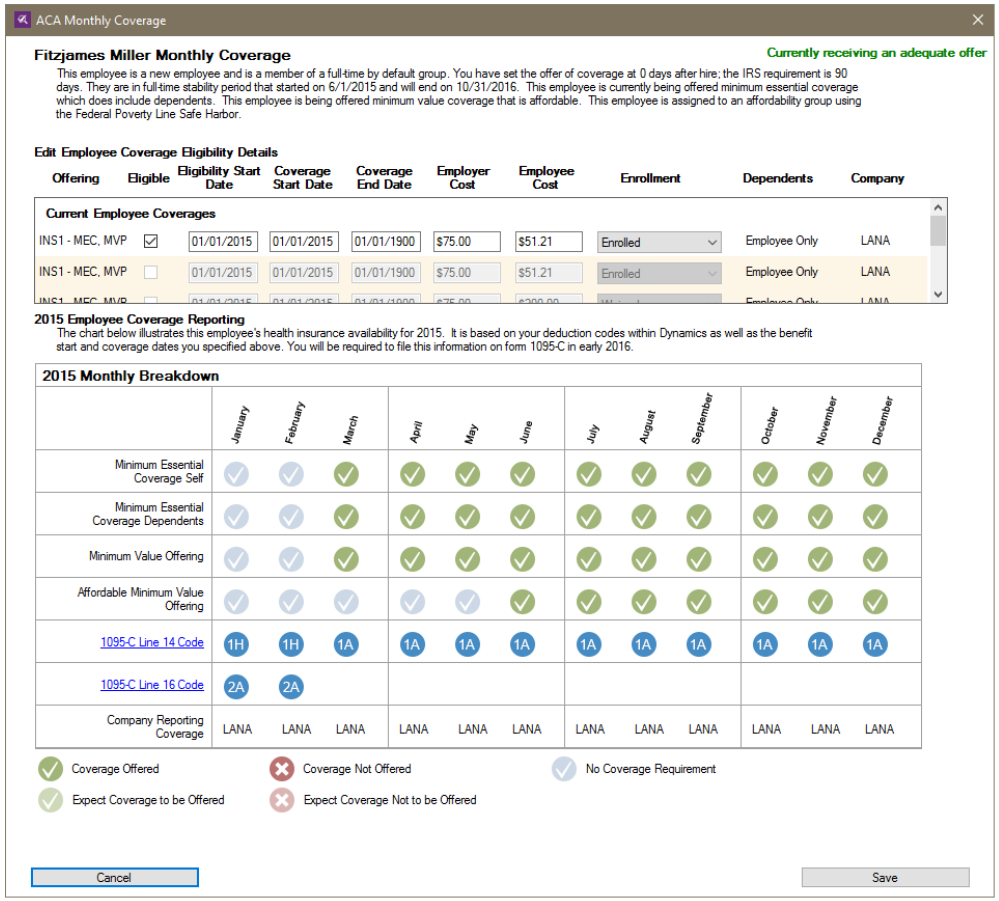
Each employee within the Coverage Results Grid has an Offer Determination displayed that is also a link. Clicking on an employee's Offer Determination link will launch the user into the employee's coverage details page. This is an existing page that was previously accessible by clicking the "See full details" link from the previous results details page.

Once the Employee Coverage Details modal displays, a few things may look a bit different, but rest-assured that all of the existing details, with a few enhancements, have been maintained.

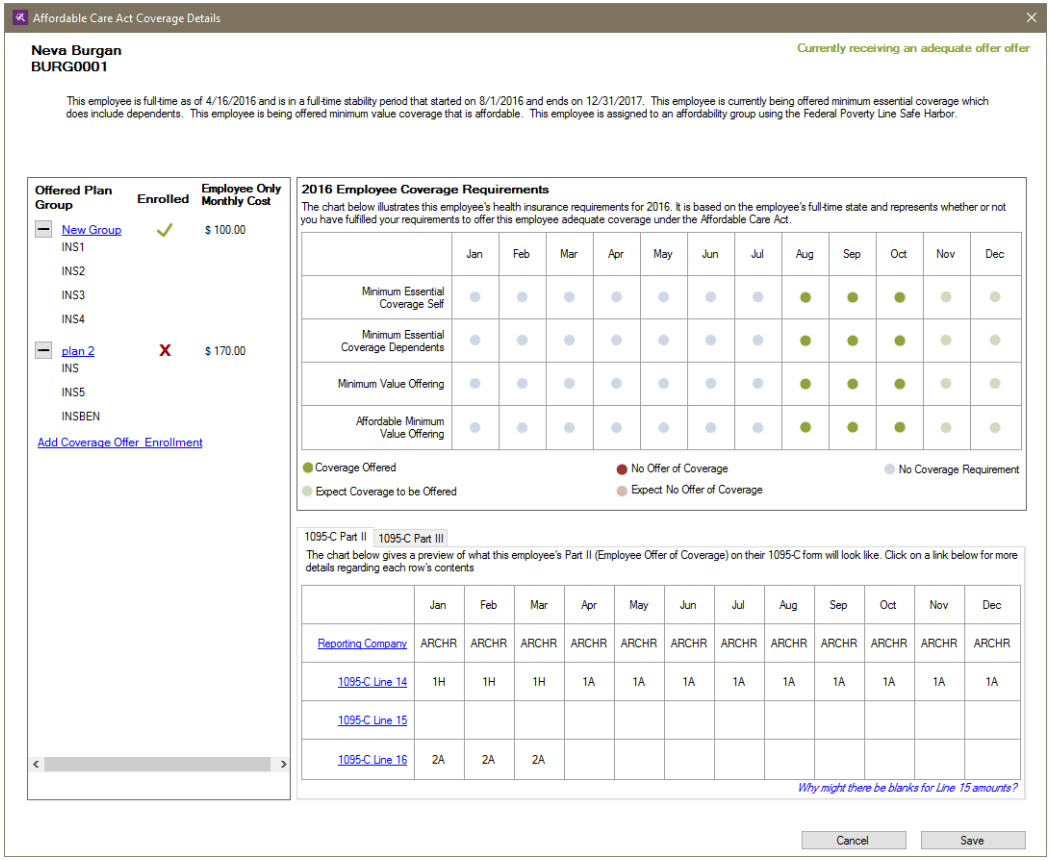
Let's take a look at what has changed with the Employee Coverage Details modal. The following page shows a comparison of the previous and new employee details screens.

Each of the specific sections that have changes will be detailed below in sections 3.2.3.1-3.2.3.4.

Previous Employee Coverage Details



New Employee Coverage Details

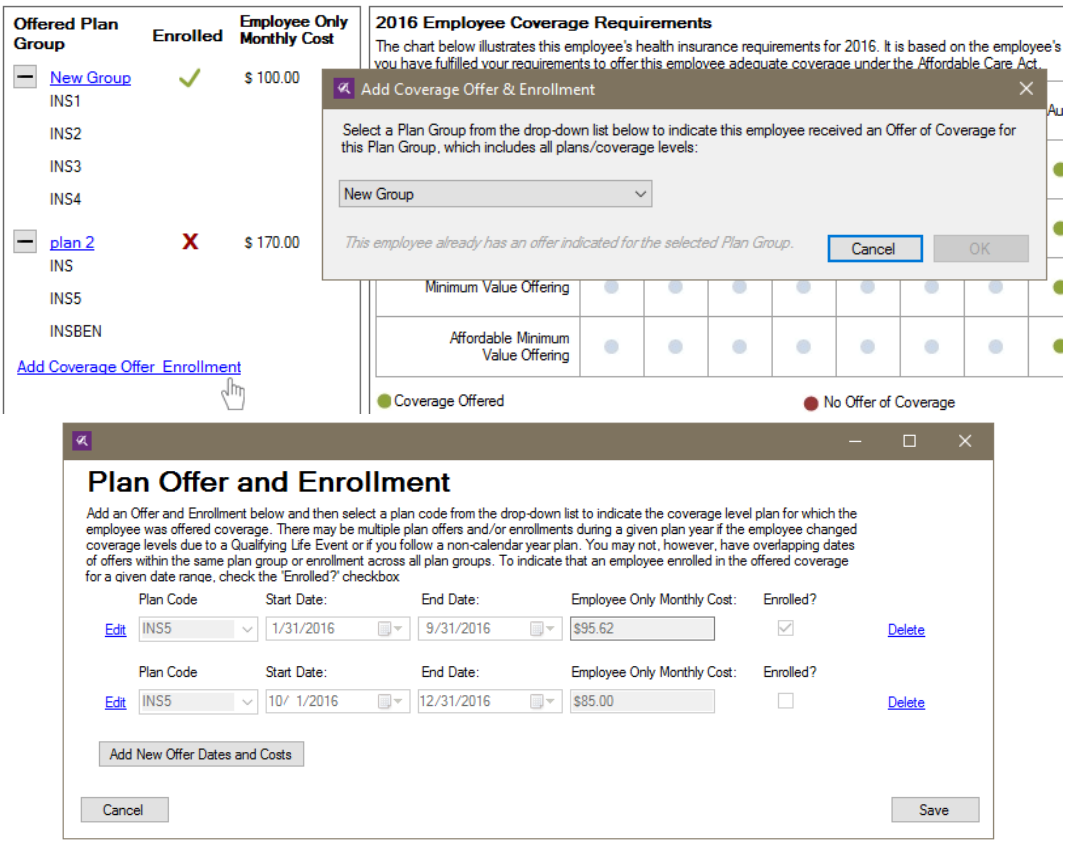


3.2.3.1. *Coverage Offer & Enrollment*

The Coverage Offer & Enrollment section replaces the previous Employee Coverage Eligibility Details section. The user may add or remove coverage offers and adjust/edit enrollment selections through this section at the employee level. This information will then be used to update the employees Coverage Requirements and Part II sections accordingly, based on the Plan Group(s) selected.

To add a new Plan Group Offer and Enrollment, the user may click and choose a Plan Group from the drop-down list of all set up Plan Groups for the company. From there, the user will then choose a plan code/coverage level to indicate which level the employee enrolled in. If the employee simply waived coverage, the user may just choose the Employee Only plan to set the offer dates. To indicate enrollment, check the Enrolled? checkbox for the selected row. If waived, leave unchecked.

Upon saving the Coverage Offer & Enrollment window, the employee's Requirements and Part II (lines 14-16) information will update accordingly, however these manual edits or additions will not sync down to GP.



3.2.3.2. Coverage Requirements Breakdown

The Employee Coverage Requirements section has been only slightly adjusted to now display the employee's Minimum Essential Coverage for Self and Dependents, Minimum Value Offering, and Affordability requirements as dot icons rather than the check/x icons previously displayed.

The Line 14 and 16 codes, as well as the reporting company information, has been broken out into the lower 1095-C Part II section (discussed below in 3.2.3.3).

2016 Employee Coverage Requirements

The chart below illustrates this employee's health insurance requirements for 2016. It is based on the employee's full-time state and represents whether or not you have fulfilled your requirements to offer this employee adequate coverage under the Affordable Care Act.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Minimum Essential Coverage Self	○	○	○	●	●	●	●	●	●	●	○	○
Minimum Essential Coverage Dependents	○	○	○	●	●	●	●	●	●	●	○	○
Minimum Value Offering	○	○	○	●	●	●	●	●	●	●	○	○
Affordable Minimum Value Offering	○	○	○	●	●	●	●	●	●	●	○	○

● Coverage Offered ● No Offer of Coverage ○ No Coverage Requirement

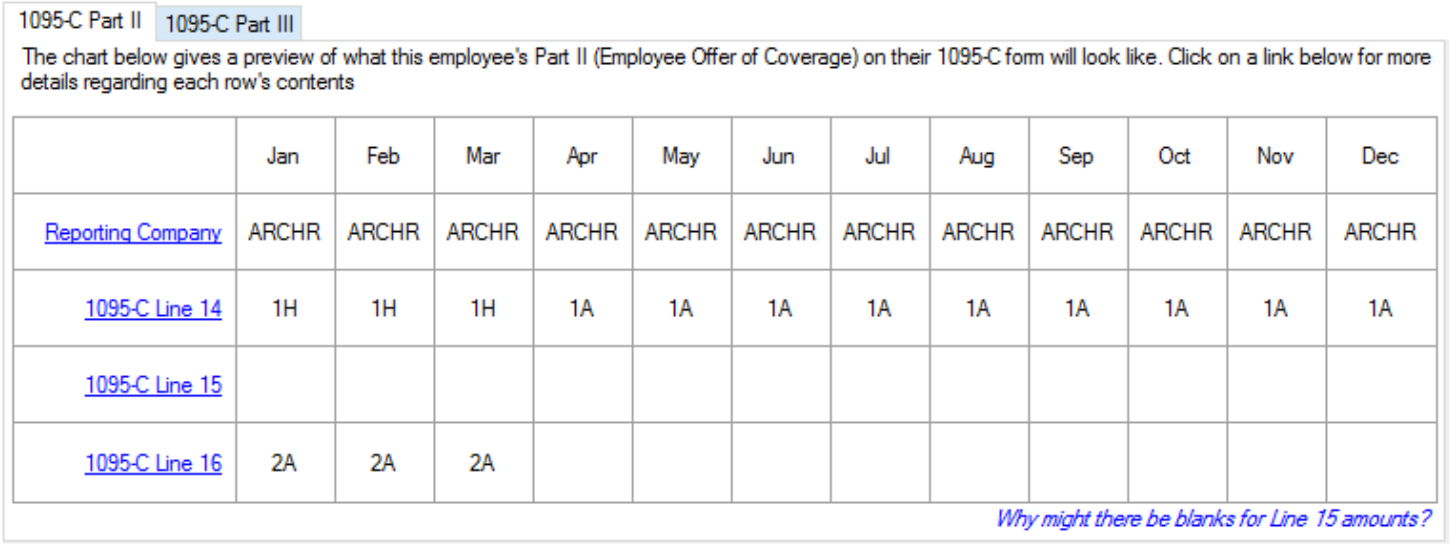
○ Expect Coverage to be Offered ● Expect No Offer of Coverage

3.2.3.3. 1095-C Part II: Lines 14-16

The new 1095-C Part II tabbed section includes the Reporting Company and Lines 14-16 data for each elapsed month of the chosen ACA Reporting Year. This display directly correlates to the data that will be imported into the Year-End Forms portal at year-end to populate and report your employees' 1095-C forms.

Line 15 is a new field and will display for those month's in which the employee's corresponding month's Line 14 is a code 1B, 1C, 1D, 1E, 1J, or, 1K.

Each row's header now has additional information for reference and Line 14 and 16 codes are broken down into simplified terms. The display of codes and amounts for Lines 15 and 16 will display in accordance with IRS regulations, meaning that some may be blank due to IRS guidance that they are unnecessary when combined with specific Line 14 codes (ie when Line 14 is a code 1A, there should be no Line 15 amount or Line 16 code determined, displayed, or populated on the employee's 1095-C).


1095-C Part II | 1095-C Part III

The chart below gives a preview of what this employee's Part II (Employee Offer of Coverage) on their 1095-C form will look like. Click on a link below for more details regarding each row's contents

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Reporting Company	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR	ARCHR
1095-C Line 14	1H	1H	1H	1A	1A	1A	1A	1A	1A	1A	1A	1A
1095-C Line 15												
1095-C Line 16	2A	2A	2A									

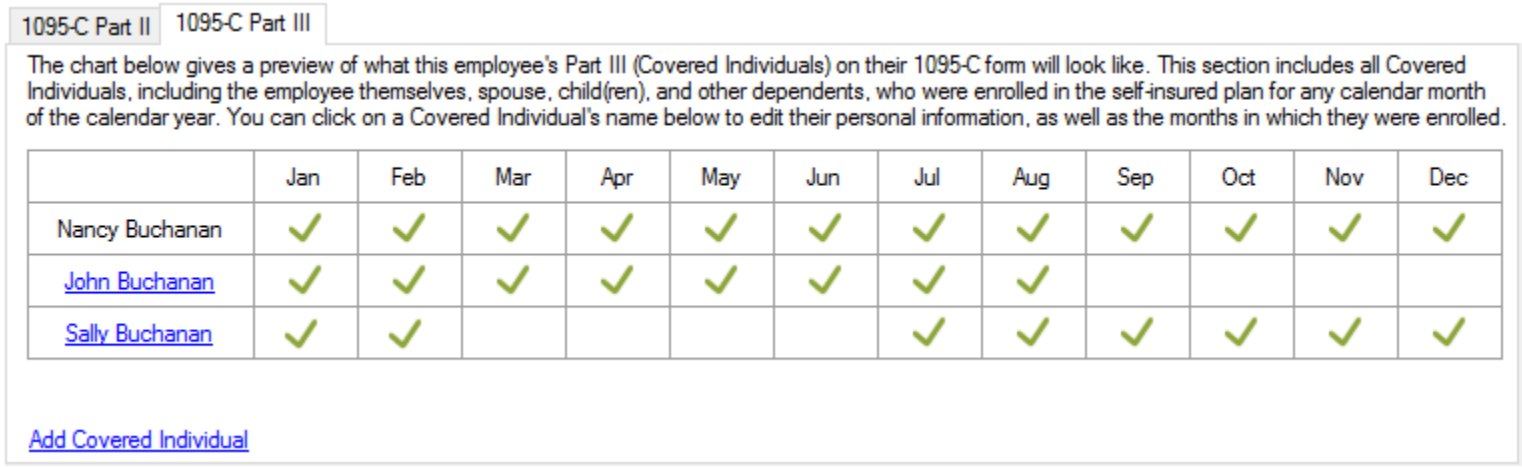
Why might there be blanks for Line 15 amounts?

3.2.3.4. 1095-C Part III: Covered Individuals

The new 1095-C Part III tabbed section replaces the previous 'Dependents' link for adding and editing Covered Individuals. It is important to note that the Covered Individuals section is only required and meant to be reported on the employee's 1095-C form if the employee and/or their dependents were enrolled in self-insured health coverage. Therefore, this tab selection will only be accessible if the employee is enrolled, for at least one month of the ACA Reporting Year, in a Plan Group that was indicated as being a self-insured health coverage offering on set up.

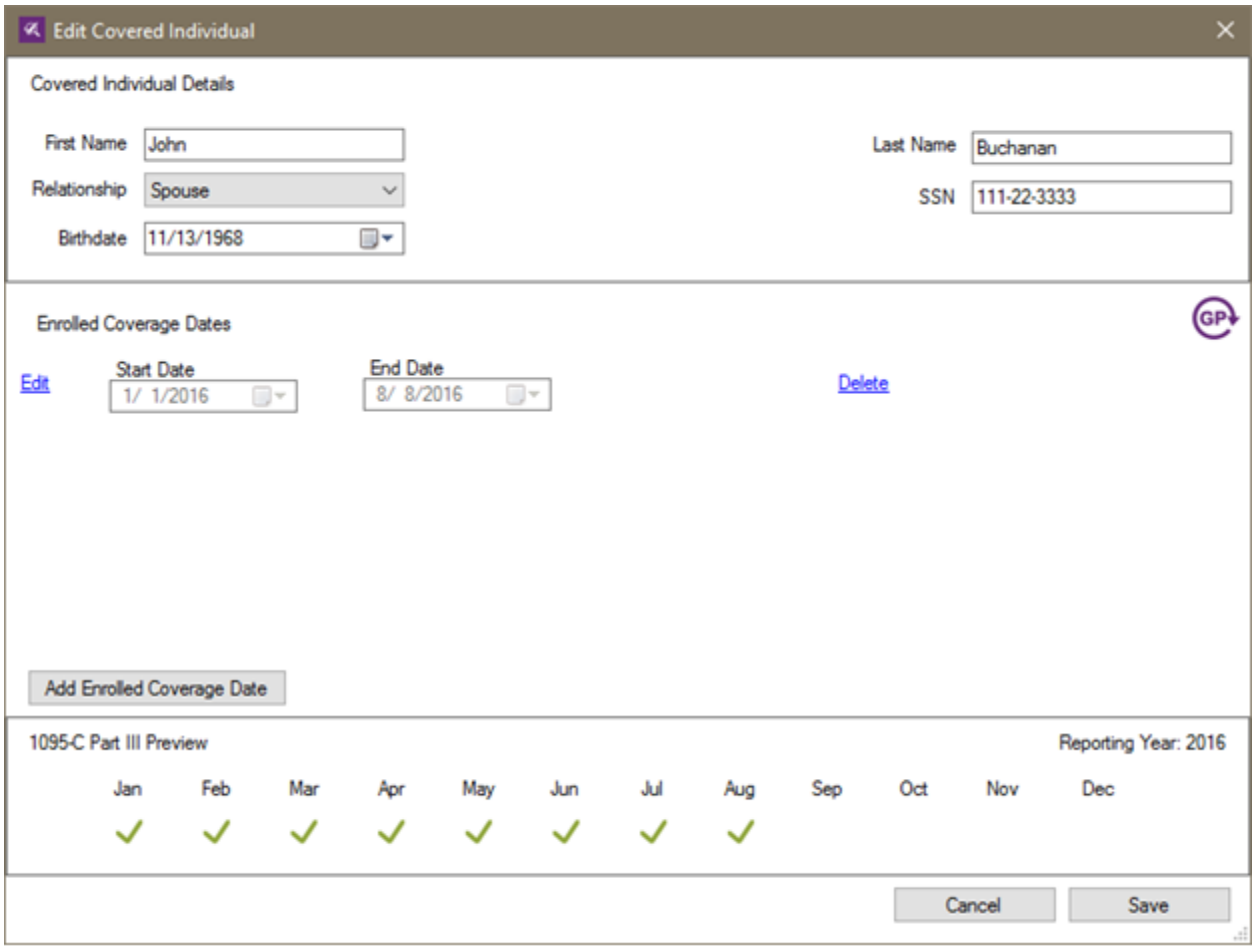
The user may manually edit, add, or remove a covered individual, other than the employee, by clicking on the Covered Individual's name. The employee's coverage details must be adjusted within the Offer and Enrollment section (3.2.3.1).

This display directly correlates to the data that will be imported into the Year-End Forms portal at year-end to populate and report your employees' 1095-C forms.



3.2.3.4.1. Editing Covered Individuals

To edit a Covered Individual, click their name within the Part III grid to open the Editing module. From here, the user may edit the Covered Individual's name, relationship type, SSN, DOB, and coverage dates.

Covered Individuals may now be set up with multiple coverage date ranges to account for any gaps there may be in coverage in the given ACA Reporting Year.

Based on the Enrolled Coverage Dates set up, green checkmarks will be displayed for each month in which the Covered Individual was enrolled for at least one day of that month.