



GREENSHADES


LET US HANDLE THAT

Dynamics Payroll Inspector
Affordable Care Act Widgets
Redesign Guide

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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.

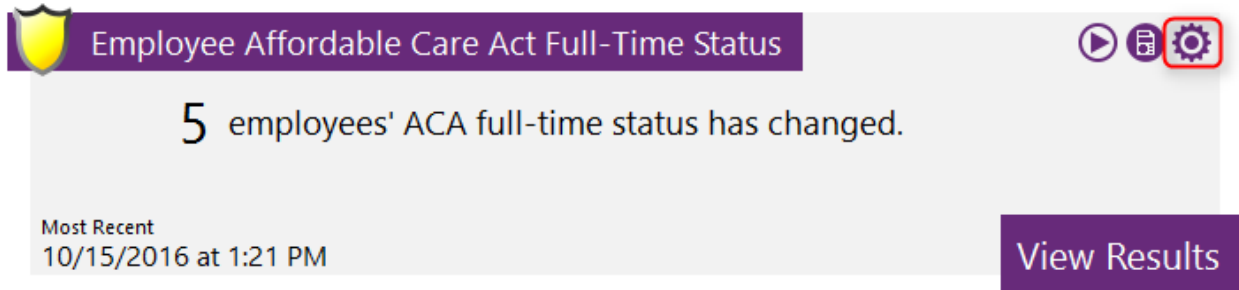
As an overall enhancement across the product, helpful links providing additional IRS documentation, reference, or scenarios have been included. Whenever the user runs across verbiage in [blue](#) or a  icon, click for more details pertaining to the item and/or an IRS documentation link for additional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

Affordable Care Act Full Time Status Settings Close

This tracker will determine the full-time status of active employees according to ACA look-back period requirements. This tracker is set to inspect your payroll data every hour.

0 Employee Full-Time Statuses have been verified and 0 have been ignored

Tracker is Active? [Advanced Settings](#)

Full-time status

Select where in GP you would like us to store each employee's full-time determination: Do not store

Which field should be used to automatically consider full-time for new hires: Employee Class

FULLTIME
 MONTHLY
 OFF-MONTH
 VARIABLE

For new hires, select when the initial measurement period should start: Date of Hire

Are you an Educational Institution following the 26-week break-in-service period? Yes No

Do you have any [mileage- or piecework-based employees](#) that you would like to set up rates per hour for?

Please mark each of paycodes below that represent [hours of service](#) for your employees:

| Pay Code | Description | Pay Type | Is Piecework | Pieces Per Hour |
|--|---------------|---------------|-------------------------------------|-----------------|
| <input checked="" type="checkbox"/> Filter | <i>Filter</i> | <i>Filter</i> | <input type="checkbox"/> | <i>Filter</i> |
| <input checked="" type="checkbox"/> HOUR | Hourly | Hourly | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> MILES | Mileage | Piecework | <input checked="" type="checkbox"/> | 50.00000 |
| <input checked="" type="checkbox"/> SALTST | Salary Test | Salary | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> SALY | Salary | Salary | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> SICK | Sick time | Sick | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> VAC | Vacation | Vacation | <input type="checkbox"/> | |

Aggregated Group

This company is not currently setup as a member of an Aggregated ALE Group. ?

Create Aggregated ALE Group

Measurement Groups

Define measurement groups for different groups of employees. These measurement periods are the basis for determining the employee's full-time status and other important dates for health insurance coverage.

Create Measurement Group 3 employees of 95 are currently covered by a measurement group

| | Name | Measurement Period Length | Stability Period Start Rule | Full Time Stability Period Length | Non Full Time Stability Period Length | |
|----------------------|------|---------------------------|-----------------------------|-----------------------------------|---------------------------------------|------------------------|
| Edit | GRU | 12 months | First of the mon... | 12 months | 12 months | Remove |

New Full-Time Status Settings Screen

Affordable Care Act Full Time Status Settings Close

This tracker will determine the full-time status of active employees according to ACA look-back period requirements. This tracker is set to inspect your payroll data every hour.

0 Employee Full-Time Statuses have been verified and 0 have been ignored

Tracker is Active? [Advanced Settings](#)

Aggregated Group

This company is not currently setup as a member of an Aggregated ALE Group. ?

Create Aggregated ALE Group

Company Settings

Click the Edit Company Settings button below to modify company-level settings.

Current Settings:

Observe break-in-service rules? **13 Weeks**
 Store full-time determination in GP? **Do not store**
 Employees that are automatically full-time: **Employee Class: FULLTIME, MONTHLY, OFF-MONTH**
 New hire initial measurement start: **Date of Hire**
 Mileage- or Piecework-based employees? **Yes**
 Paycodes to include toward Hours Worked? **HOUR, MILES, SALTEST, SALY, SICK, VAC. ... [View All Paycodes](#)**

Edit Company Settings

Measurement Groups

Define measurement groups for different groups of employees. These measurement periods are the basis for determining the employee's full-time status and other important dates for health insurance coverage.

Create Measurement Group 3 employees of 95 are currently covered by a measurement group

| | Name | Measurement Period Length | Stability Period Start Rule | Full Time Stability Period Length | Non Full Time Stability Period Length | |
|----------------------|------|---------------------------|-----------------------------|-----------------------------------|---------------------------------------|------------------------|
| Edit | GRU | 12 months | First of the mon... | 12 months | 12 months | Remove |

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.

Company Settings

Click the Edit Company Settings button below to modify company-level settings.

Current Settings:

| | |
|---|--|
| Observe break-in-service rules? | 13 Weeks |
| Store full-time determination in GP? | Do not store |
| Employees that are automatically full-time: | None |
| New hire initial measurement start: | Date of Hire |
| Mileage- or Piecework-based employees? | No |
| Paycodes to include toward Hours Worked? | BONS. COMM. EXAT. HOLI. HOUR. OVER. PRFT. ... View All Paycodes |

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.

ACA Full Time Status Company Settings

Fabrikam, Inc.

Would you like to observe the [break-in-service rehire rules](#)?

Note: Unchecking this setting will always consider rehires as ongoing employees rather than a new hire.

I would like to follow the standard 13-week break-in-service period.

I am an Educational Institution and would like to follow the 26-week break-in-service period.

Would you like to store each employee's [ACA Full-Time Determination](#) in GP?

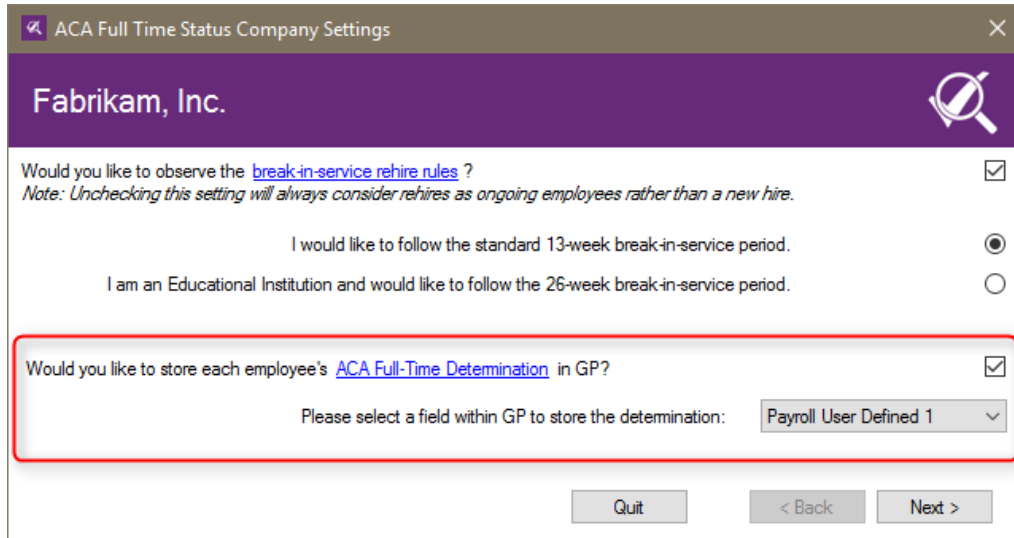
Please select a field within GP to store the determination:

Quit < Back Next >

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.



ACA Full Time Status Company Settings

Fabrikam, Inc.

Would you like to observe the [break-in-service rehire rules](#) ?
Note: Unchecking this setting will always consider rehires as ongoing employees rather than a new hire.

I would like to follow the standard 13-week break-in-service period.

I am an Educational Institution and would like to follow the 26-week break-in-service period.

Would you like to store each employee's [ACA Full-Time Determination](#) in GP?

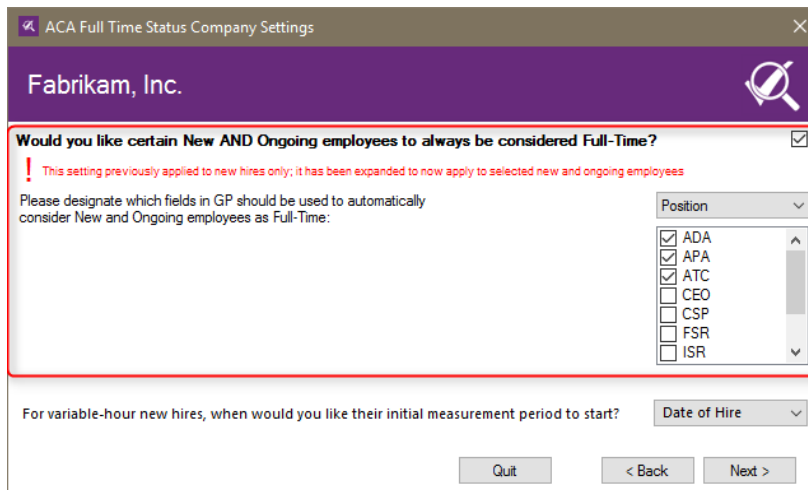
Please select a field within GP to store the determination: Payroll User Defined 1

Quit < Back Next >

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.



ACA Full Time Status Company Settings

Fabrikam, Inc.

Would you like certain New AND Ongoing employees to always be considered Full-Time?
! This setting previously applied to new hires only; it has been expanded to now apply to selected new and ongoing employees

Please designate which fields in GP should be used to automatically consider New and Ongoing employees as Full-Time:

Position

- ADA
- APA
- ATC
- CEO
- CSP
- FSR
- ISR

For variable-hour new hires, when would you like their initial measurement period to start? Date of Hire

Quit < Back Next >

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)

ACA Full Time Status Company Settings

Fabrikam, Inc.

Would you like certain New AND Ongoing employees to always be considered Full-Time?

! This setting previously applied to new hires only; it has been expanded to now apply to selected new and ongoing employees

Please designate which fields in GP should be used to automatically consider New and Ongoing employees as Full-Time:

Position

- ADA
- APA
- ATC
- CEO
- CSP
- FSR
- ISR

For variable-hour new hires, when would you like their initial measurement period to start?

Quit < Back Next >

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.

ACA Full Time Status Company Settings

Fabrikam, Inc.

Do you have any [mileage- or piecework-based employees](#) that you would like to set up rates per hour for?

Please select which paycodes represent [hours of service](#) for your employees:

| | Pay Code | Description | Pay Type | Is Piecework | Pieces Per Hour |
|-------------------------------------|----------|---------------------|----------------|-------------------------------------|-----------------|
| <input checked="" type="checkbox"/> | Filter | Filter | Filter | <input checked="" type="checkbox"/> | Filter |
| <input checked="" type="checkbox"/> | BONS | Bonus Pay | Other | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | COMM | Commission Pay Code | Commission | <input checked="" type="checkbox"/> | 66 |
| <input checked="" type="checkbox"/> | EXAT | Expense Account | BusinessExpe.. | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> | HOLI | Holiday | Holiday | <input type="checkbox"/> | |

Quit < Back Save

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.

ACA Full Time Status Company Settings

Fabrikam, Inc.

Do you have any [mileage- or piecework-based employees](#) that you would like to set up rates per hour for?

Please select which paycodes represent [hours of service](#) for your employees:

| | Pay Code | Description | Pay Type |
|-------------------------------------|----------|---------------------|-----------------|
| <input checked="" type="checkbox"/> | Filter | Filter | Filter |
| <input checked="" type="checkbox"/> | BONS | Bonus Pay | Other |
| <input checked="" type="checkbox"/> | COMM | Commission Pay Code | Commission |
| <input checked="" type="checkbox"/> | EXAT | Expense Account | BusinessExpense |
| <input checked="" type="checkbox"/> | HOLI | Holiday | Holiday |

Quit < Back Save

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.

The screenshot shows two main sections. The top section, titled "Aggregated Group", contains the text "This company is currently a member of the following Aggregated ALE Group:" followed by the name "ARCLANA" and a "Manage Aggregated ALE Groups" button. The bottom section, titled "Company Settings", includes a dropdown menu with a red warning message: "You need to set up company settings for 1 company within this Aggregated Group." The dropdown list contains several company names, with "Cherry - CHERR" highlighted in purple. Below the dropdown are various settings, including "Store full-time determination in GP?", "Employees that are automatically full-time:", "New hire initial measurement start:", "Mileage- or Piecework-based employees?", and "Paycodes to include toward Hours Worked?". To the right of these settings are values such as "13 Weeks", "Payroll User Defined 2", "Employee Classes:", "Date of Hire", "Yes", and "SALY, SICK, VAC, HOUR, SALTST, MILES". An "Edit Company Settings" button is located at the bottom of the section.

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 Settings

Create Measurement Group

Measurement Group Name

Please give this measurement group a unique name:

Select Employees for Measurement

According to the Affordable Care Act, you may group employees into Measurement Groups based on the categories below to determine an employee's full-time status based on their hours worked.

Please select the categories of employees that apply to this Measurement Group

Salaried Status

Check All

- Blank (ARCHR)
- VARIABLE (ARCHR)
- FULLTIME (ARCHR)
- MONTHLY (ARCHR)
- OFF-MONTH (ARCHR)
- FULLTIME (LANA)
- VARIABLE (LANA)

Union Codes

Check All

- Blank (ARCHR)
- Blank (LANA)

Work Location State

Check All

- PA (ARCHR)
- CA (ARCHR)
- KY (ARCHR)
- NY (ARCHR)
- OH (ARCHR)
- OR (ARCHR)
- CA (LANA)
- NY (LANA)
- OR (LANA)

Measurement Group Wizard Step 2

Measurement Group Settings

Create New Measurement Group

Stability Period

How long is your company's full-time stability period?

How long is your company's non-full-time stability period?

Administration Period

My Administrative Period lasts exactly days. My Stability Period begins immediately afterwards.
 My Administrative Period lasts until the end of the month following days. My Stability Period begins on the first day of the following month.

Measurement Period

How long would you like your measurement (lookback) period to be?

What is the first day of your company's work week?

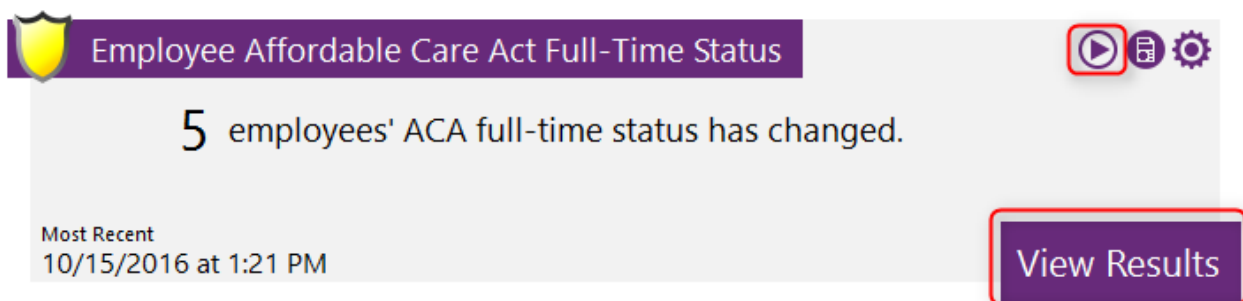
When did your company's [current measurement period start](#)?

| Measurement Period | Administrative Period | Full Time Stability Period | Non-Full Time Stability Period |
|----------------------|-----------------------|----------------------------|--------------------------------|
| 11/1/2014-10/31/2015 | 11/1/2015-12/31/2015 | 1/1/2016-12/31/2016 | 1/1/2016-12/31/2016 |
| 11/1/2015-10/31/2016 | 11/1/2016-12/31/2016 | 1/1/2017-12/31/2017 | 1/1/2017-12/31/2017 |
| 11/1/2016-10/31/2017 | 11/1/2017-12/31/2017 | 1/1/2018-12/31/2018 | 1/1/2018-12/31/2018 |

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

Affordable Care Act Full-Time Status Results

2016 Affordable Care Act Employee Full-Time Status Results

The results of the Affordable Care Act employee full-time status verification are shown below.

44 Aggregated Employees' full-time status was inspected

- 31** Aggregated Employees' full-time status does not need to change
 - 1** Aggregated Employees are full-time and should be offered health insurance
 - 2** Aggregated Employees are no longer full-time at the end of their current stability period
- 10** Aggregated Employees' full-time status could not be determined

72.73 % of your aggregated employees are considered full-time according to the Affordable Care Act

Quit Next

New Full-Time Results Dashboard

Affordable Care Act Full-Time Status Results

Click any of the links below to view pre-filtered Full-Time Status results. If you wish to view results for all employees, click the "View All Results" link

3 Employees' full-time status were inspected

0 Employees' full-time status do not need to change

0 Employees became full-time and should be offered health insurance

0 Employees need an offer of coverage in the next stability period

2 Employees are no longer full-time at the end of their current stability period

[View All Results](#)

Upcoming Action Items

- 0** Employees have a measurement period ending within the next month
- 0** Employees have a stability period starting in the next month
- 0** Employees have a stability period ending in the next month
- 0** Employees' status could not be determined

New Employees

- 0** New employees this month
- 0** Full-time new hires this month
- 0** Variable-hour new hires this month

Close

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

Affordable Care Act Full-Time Status Results

2016 Affordable Care Act Employee Full-Time Status Results

The results of the Affordable Care Act full-time status verification are shown below.

Search Employees: Show: **Only Archer Employees** | **All Inspected Employees**

Glynnis Arndt ⓘ

This new employee was hired and determined to be full-time based on the setup. The administrative period was reduced to comply with the IRS new hire 13 month rule.

Hire Date: 4/15/2016
 Measurement Period: 4/15/2016-4/15/2016
 Next Verification Date: 9/1/2016

Alistair Greene ⓘ

The full-time eligibility of transactions found that for the company or the Archer GREE0001 to be determined because there were no acceptable payroll period. This is typically due to an employee no longer working ended.
 Archer TWO GREE0001
 Lana ALGR0001

Full-Time Determination Date: 9/1/2015
 Measurement Period (Avg Aggregated Hours): 9/1/2014-8/31/2015 (94.04/week)
 Stability Period: 11/1/2015-10/31/2016
 Next Verification Date: 9/1/2016

Bingham Bronstein ⓘ

This new employee was hired and determined to be full-time based on the setup. The administrative period was reduced to comply with the IRS new hire 13 month rule.

Back Results 1 - 20 [Next \(21-40\) >>](#) Finish

New Full-Time Results Reporting Grid

Affordable Care Act Full-Time Status Results

44 Aggregated Employees' full-time statuses were inspected | 5 Aggregated Employees need an offer of coverage in the next | 5 Aggregated Employees became full-time and should be offered health insurance | 2 Aggregated Employees are no longer full-time at the end of their current stability period

Show: **All Employees in Aggregated Group**

| Employee ID | First Name | Last Name | Change in status | Avg. Hours | Measurement Period | Status | Stability Period |
|-----------------------------|------------|-----------|------------------|----------------------------|-----------------------|---------------------|-----------------------|
| Employee | | | Change In Status | Measurement Period | | Stability Period | |
| Elston Guillory GUIL0001 | | | Yes | 39.89 hours/week | 11/01/2014-10/31/2015 | Full-Time | 01/01/2016-12/31/2016 |
| Carl Hall HALL0001 | | | No | Initial Measurement Period | 11/01/2015-10/31/2016 | N/A Undetermined | |
| Yoel Harper HARP0001 | | | Yes | 39.86 hours/week | 11/01/2014-10/31/2015 | Full-Time | 01/01/2016-12/31/2016 |
| Gawain Heaps HEAP0001 | | | No | Initial Measurement Period | 04/01/2016-03/31/2017 | N/A Undetermined | |
| Denise Hilty HILT0001 | | | No | Initial Measurement Period | 04/15/2016-04/14/2017 | N/A Undetermined | |

Export to Excel Reset Filters Results 1 - 20 [Next \(21-40\) >>](#) Back Close

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.

Affordable Care Act Full-Time Status Weekly Breakdown

| | | | |
|------------------------|-----------------|-------------------------------|-----------------------|
| Elston Guillory | GUIL0001 | Measurement Period: | 11/01/2014-10/31/2015 |
| Hire Date: | 10/01/2014 | Administrative Period: | 11/01/2015-12/31/2015 |
| Employee Type: | OngoingEmployee | Stability Period: | 01/01/2016-12/31/2016 |

This is an ongoing employee who has worked more than 30 hours per week on average and therefore is a **Full-Time** employee.

The employee worked a total of **2113.98 hours** over a period of 53 weeks for an average of **39.89 hours**. Hours start calculating on the first day of the measurement period, which was 11/1/2014.

| Week beginning: | Hours: | Week beginning: | Hours: |
|-----------------|--------|-----------------|--------|
| 10/26/2014 | 39.57 | 05/03/2015 | 40.00 |
| 11/02/2014 | 39.57 | 05/10/2015 | 40.00 |
| 11/09/2014 | 39.57 | 05/17/2015 | 40.00 |
| 11/16/2014 | 39.57 | 05/24/2015 | 40.00 |
| 11/23/2014 | 39.57 | 05/31/2015 | 40.00 |
| 11/30/2014 | 39.57 | 06/07/2015 | 40.00 |
| 12/07/2014 | 39.57 | 06/14/2015 | 40.00 |
| 12/14/2014 | 39.57 | 06/21/2015 | 40.00 |
| 12/21/2014 | 39.57 | 06/28/2015 | 39.75 |
| 12/28/2014 | 39.94 | 07/05/2015 | 39.57 |
| 01/04/2015 | 40.44 | 07/12/2015 | 39.57 |
| 01/11/2015 | 40.44 | 07/19/2015 | 39.57 |
| 01/18/2015 | 40.44 | 07/26/2015 | 39.57 |
| 01/25/2015 | 40.44 | 08/02/2015 | 39.57 |
| 02/01/2015 | 40.44 | 08/09/2015 | 39.57 |
| 02/08/2015 | 40.44 | 08/16/2015 | 39.57 |
| 02/15/2015 | 40.44 | 08/23/2015 | 39.57 |
| 02/22/2015 | 40.44 | 08/30/2015 | 39.57 |
| 03/01/2015 | 40.44 | 09/06/2015 | 39.57 |
| 03/08/2015 | 40.44 | 09/13/2015 | 39.57 |
| 03/15/2015 | 40.44 | 09/20/2015 | 39.57 |
| 03/22/2015 | 40.44 | 09/27/2015 | 39.57 |
| 03/29/2015 | 40.19 | 10/04/2015 | 39.57 |
| 04/05/2015 | 40.00 | 10/11/2015 | 39.57 |
| 04/12/2015 | 40.00 | 10/18/2015 | 39.57 |
| 04/19/2015 | 40.00 | 10/25/2015 | 39.57 |
| 04/26/2015 | 40.00 | N/A | N/A |

[Export to Excel](#) Finish

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.



The screenshot shows a window titled "Status Explanation" for employee "Elston Guillory" (ID: GUIL0001). The text states: "This employee was determined to be **Full-Time** in the most recent measurement period. Health insurance coverage must be offered according to the following information:

- Calculated Hire Date:** 10/01/2014
- Measurement Period:** 11/01/2014-10/31/2015
- Average Hours:** [39.89 hours/week](#)

Coverage Must Be Offered By: 01/01/2016

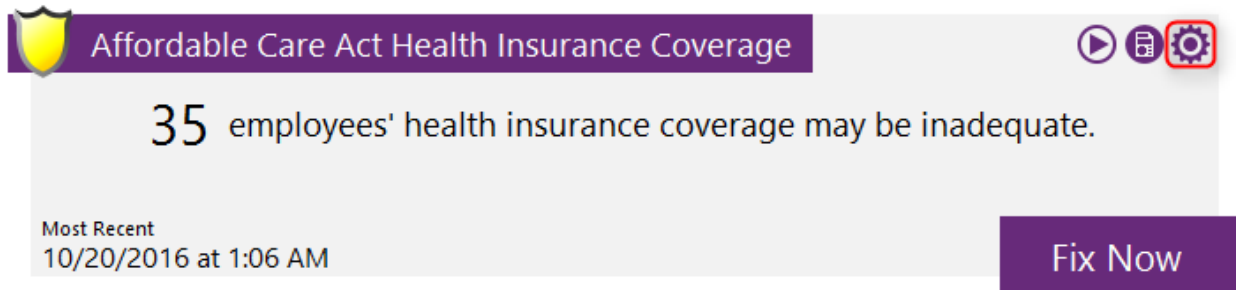
If you would like to change this employee's determination for this measurement period to **Non Full-Time**, [click here](#).

A "Close" button is located in the bottom right corner of the window.

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

Affordable Care Act Health Insurance Coverage Settings Close

This tracker will review the health insurance coverage provided to full-time employees under ACA requirements. This tracker is set to inspect your payroll data every hour.

Tracker is Active? [Advanced Settings](#)

Company Settings

Does your company offer coverage before it is required at the end of an employee's [Limited Non-Assessment Period](#)?

My company offers coverage days following hire.

Which date should be used to determine your employees' Coverage End Date?

Coverage Year

Which year should be inspected for coverage:

If you have weekly or bi-weekly deductions, please select how many deductions your plan has per year:

GP Human Resources Usage

Benefits' Setup

I have my benefits set up in Human Resources

I do not have my benefits set up in Human Resources (use payroll instead)

Code Mapping ?

Select Code to Add:

| Code | Self-Insured Plan? | ACA Type | Coverage Level | Employee Only | Historical Costs |
|--|-------------------------------------|-------------------------|-----------------|----------------------------------|---------------------------------------|
| <input checked="" type="checkbox"/> INS | <input checked="" type="checkbox"/> | MEC and Minimum Value | Employee Only | <input type="text" value="INS"/> | <input type="button" value="Manage"/> |
| <input checked="" type="checkbox"/> INS1 | <input checked="" type="checkbox"/> | MEC and Minimum Value | Employee Spouse | <input type="text" value="INS"/> | |
| <input checked="" type="checkbox"/> INS2 | <input checked="" type="checkbox"/> | MEC and Minimum Value | Employee Family | <input type="text" value="INS"/> | |
| <input checked="" type="checkbox"/> INS4 | <input checked="" type="checkbox"/> | MEC and Minimum Value | Employee Family | <input type="text" value="INS"/> | |
| <input checked="" type="checkbox"/> INSBEN | <input checked="" type="checkbox"/> | Minimum Essential (MEC) | Employee Only | | <input type="button" value="Manage"/> |

Note: If an employee is associated to a Benefit code only, rather than a deduction code from above, the benefit code's information will be used and the employee premium is assumed to be \$0.00. In this case, make sure that your Master Deduction code is the same name as your Benefit code.

Affordability Safe Harbor Groups

Define affordability safe harbor groups for different groups of employees. These groupings will be used when determining affordability for your employees

Note: If an employee is not assigned to an Affordability Group, the Federal Poverty Line will be used to determine affordability.

| | Affordability Group Name | Safe Harbor Type | Employees Included in Group |
|----------------------|--------------------------|------------------|-----------------------------|
| Edit | All: Federal W-2 | Rate of Pay | 93 of 93 employees |

New Coverage Settings Screen

Affordable Care Act Health Insurance Coverage Settings Close

This tracker will review the health insurance coverage provided to full-time employees under ACA requirements. This tracker is set to inspect your payroll data every hour.

Tracker is Active? [Advanced Settings](#)

Company Settings

Does your company offer coverage before it is required at the end of an employee's [Limited Non-Assessment Period](#)?

My company offers coverage days following hire.

Which date should be used to determine your employees' Coverage End Date?

Deductions

If you have weekly or bi-weekly deductions, please select how many deductions your plan has per year:

GP Human Resources Usage

Benefits' Setup

I have my benefits set up in Human Resources

I do not have my benefits set up in Human Resources (use payroll instead)

[Dependents/Covered Individuals:](#)

I have dependents' coverage set up in the Advanced HR module

I have dependents' coverage set up through the Health Ins. Coverage Indicator on the Dependents Card

Plan Groups (Previously Code Mapping)

| | | |
|----------------------|-------------|------------------------|
| Edit | EE + Spouse | Remove |
| Edit | EE + Family | Remove |

Aggregated Affordability Safe Harbor Groups

All members of this aggregated group must have the same affordability groups, however you may define affordability safe harbor groups for different groups of employees. These groupings will be used when determining affordability for your employees.

Note: If an employee is not assigned to an Affordability Group, the Federal Poverty Line will be used to determine affordability.

| | Aggregated Affordability Group Name | Safe Harbor Type | Aggregated Employees Included in Group |
|----------------------|-------------------------------------|------------------|--|
| Edit | All: Federal W-2 | Rate of Pay | 93 of 93 employees |

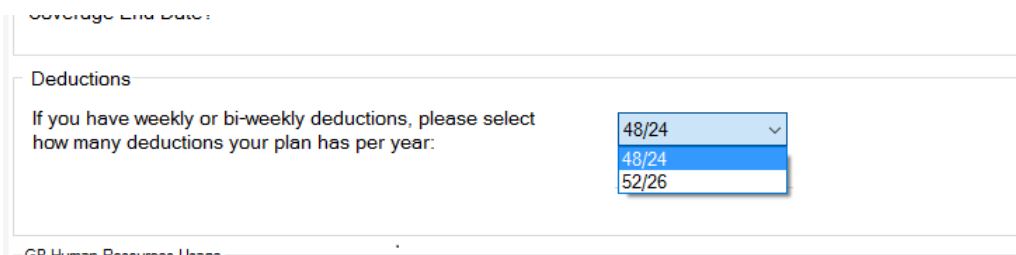
3.1.1. Company Settings

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.



Coverage End Date:

Deductions

If you have weekly or bi-weekly deductions, please select how many deductions your plan has per year:

48/24
48/24
52/26

GP Human Resources Usage

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

Code Mapping ?

Select Code to Add:

| Code | Self-Insured Plan? | ACA Type | Coverage Level | Employee Only | Historical Costs |
|---------------------------------|--------------------------|-----------------------|-----------------|---------------|---------------------------------------|
| <input type="checkbox"/> X INS | <input type="checkbox"/> | MEC and Minimum Value | Employee Only | | <input type="button" value="Manage"/> |
| <input type="checkbox"/> X INS1 | <input type="checkbox"/> | MEC and Minimum Value | Employee Family | INS | |
| <input type="checkbox"/> X INS2 | <input type="checkbox"/> | MEC and Minimum Value | Employee Spouse | INS | |

Note: If an employee is associated to a Benefit code only, rather than a deduction code from above, the benefit code's information will be used and the employee premium is assumed to be \$0.00. In this case, make sure that your Master Deduction code is the same name as your Benefit code.

New Plan Groups Setup Section

Plan Groups (Previously Code Mapping)

| | | |
|----------------------|----------------|------------------------|
| Edit | INS Plan Group | Remove |
| Edit | High Ded | Remove |

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.

See where your code mapping settings have moved within the new Plan Group setup

Code Mapping

Select Code to Add: 401K

| Code | Self-Insured Plan? | ACA Type | Coverage Level | Employee Only | Historical Costs |
|--|--------------------------|-----------------------|-----------------|---------------|---------------------------------------|
| <input checked="" type="checkbox"/> INS | <input type="checkbox"/> | MEC and Minimum Value | Employee Only | | <input type="button" value="Manage"/> |
| <input checked="" type="checkbox"/> INS1 | <input type="checkbox"/> | MEC and Minimum Value | Employee Family | INS | |
| <input checked="" type="checkbox"/> INS2 | <input type="checkbox"/> | MEC and Minimum Value | Employee Spouse | INS | |

Note: If an employee is associated to a Benefit code only, rather than a deduction code from above, the benefit code's information will be used and the employee premium is assumed to be \$0.00. In this case, make sure that your Master Deduction code is the same name as your Benefit code.

Plan Group Setup

Plan Group Name:

Select the Deduction Code, representing each plan, to include in this group by selecting/highlighting them on the left and using the arrows in the middle to add it to the right grid. Once the plan is added to the plan group, indicate each plan's coverage level within the drop-down list.
To select multiple deduction codes, hold the CTRL key while selecting each field.

| Available Deduction Codes | |
|---------------------------|-------------------------|
| Deduction Code | Description |
| <i>Filter</i> | <i>Filter</i> |
| 401K | 401(k) Deduction |
| CHD | Child Care Deduction |
| EPU | Employee Purchases |
| HDRPEE | High Deductible EE Only |
| MED | Medical Flex |
| ROTH | ROTH 401 |
| UW | United Way |

| Selected Plans | | |
|----------------|-------------------------|-------------------|
| Deduction Code | Description | Coverage Level |
| INS | Insurance Premium | Employee Only |
| INS1 | Insurance (+1 depe... | Employee + Spouse |
| INS2 | Insurance (family co... | Employee + Family |

Note: If an employee is associated to a Benefit code only, rather than a deduction code from above, the benefit code's information will be used and the employee premium is assumed to be \$0.00. In this case, make sure that your Master Deduction Code is the same name as your Benefit Code.

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.

Code Mapping

Select Code to Add: 401K Add Code

| Code | Self-Insured Plan? | ACA Type | Coverage Level | Employee Only | Historical Costs |
|------|--------------------------|-----------------------|-----------------|---------------|------------------|
| INS | <input type="checkbox"/> | MEC and Minimum Value | Employee Only | | Manage |
| INS1 | <input type="checkbox"/> | MEC and Minimum Value | Employee Family | INS | |
| INS2 | <input type="checkbox"/> | MEC and Minimum Value | Employee Spouse | INS | |

Note: If an employee is associated to a Benefit code only, rather than a deduction code from above, the benefit code's information will be used and the employee premium is assumed to be \$0.00. In this case, make sure that your Master Deduction code is the same name as your Benefit code.

See where your code mapping settings have moved within the new Plan Group setup

Plan Group Setup

INS Plan Group

Is this group of plans [Self-Insured Health Coverage](#) ?

Yes No

Does this group of plans offer a [Conditional Offer of Spousal Coverage](#) ?

Yes No


This group of plans covers the following Affordable Care Act Requirements:

[Minimum Essential Coverage \(MEC\)](#) [Minimum Value \(MV\)](#)

Out < Back Next >

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.

See where your code mapping settings have moved within the new Plan Group setup

Code Mapping


Select Code to Add: 401K

| Code | Self-Insured Plan? | ACA Type | Coverage Level | Employee Only | Historical Costs |
|------|--------------------------|-----------------------|-----------------|---------------|---------------------------------------|
| INS | <input type="checkbox"/> | MEC and Minimum Value | Employee Only | | <input type="button" value="Manage"/> |
| INS1 | <input type="checkbox"/> | MEC and Minimum Value | Employee Family | INS | |
| INS2 | <input type="checkbox"/> | MEC and Minimum Value | Employee Spouse | INS | |

Note: If an employee is associated to a Benefit code only, rather than a deduction code from above, the benefit code's information will be used and the employee premium is assumed to be \$0.00. In this case, make sure that your Master Deduction code is the same name as your Benefit code.

Plan Group Setup

INS Plan Group

Offer Effective Dates and Costs: 

You may manually enter Offer Effective Dates and their associated Employee Only Cost to accurately reflect your company's offerings. Any previous Historical Costs settings will populate here. If you do not set up any manual offer dates and costs, Payroll Inspector will continue to appropriately correlate deduction codes and the current EE Only Cost set in GP to the employee's offer.

| | | | | |
|----------------------|-----------------------|----------------------|-------------------------------------|------------------------|
| Edit | Start Date: 1/ 1/2015 | End Date: 12/31/2015 | Employee Only Monthly Cost: \$35.00 | Delete |
| Edit | Start Date: 1/ 1/2016 | End Date: 12/31/2016 | Employee Only Monthly Cost: \$50.00 | Delete |
| Edit | Start Date: 1/ 1/2017 | End Date: 12/31/2017 | Employee Only Monthly Cost: \$75.00 | Delete |

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.

Automatically assign this Plan Group's offer of coverage to certain employees i

Which employees are considered to have automatically been offered this Plan Group?

| | | | |
|--|--|---|--|
| <p>Employment Type</p> <input type="checkbox"/> All <input checked="" type="checkbox"/> FullTimeRegular <input checked="" type="checkbox"/> None <input checked="" type="checkbox"/> PartTimeRegular | <p>Employee Class</p> <input type="checkbox"/> All <input checked="" type="checkbox"/> Blank EmpClass <input checked="" type="checkbox"/> ACCT <input checked="" type="checkbox"/> ADMN <input checked="" type="checkbox"/> INST <input checked="" type="checkbox"/> SALES <input checked="" type="checkbox"/> SUPP | <p>Position</p> <input type="checkbox"/> All <input checked="" type="checkbox"/> ADA <input checked="" type="checkbox"/> APA <input checked="" type="checkbox"/> ATC <input checked="" type="checkbox"/> CEO <input checked="" type="checkbox"/> CSP <input checked="" type="checkbox"/> FSR <input checked="" type="checkbox"/> ISR <input checked="" type="checkbox"/> PRA <input checked="" type="checkbox"/> SUP <input checked="" type="checkbox"/> TEC | <p>Work Location</p> <input type="checkbox"/> All <input checked="" type="checkbox"/> INTERNATIONAL-A <input checked="" type="checkbox"/> KENTUCKY <input checked="" type="checkbox"/> LOUISIANA <input checked="" type="checkbox"/> OHIO <input checked="" type="checkbox"/> OHIOU <input checked="" type="checkbox"/> PENNSYLVANIA <input checked="" type="checkbox"/> PHILADELPHIA <input checked="" type="checkbox"/> Primary |
|--|--|---|--|

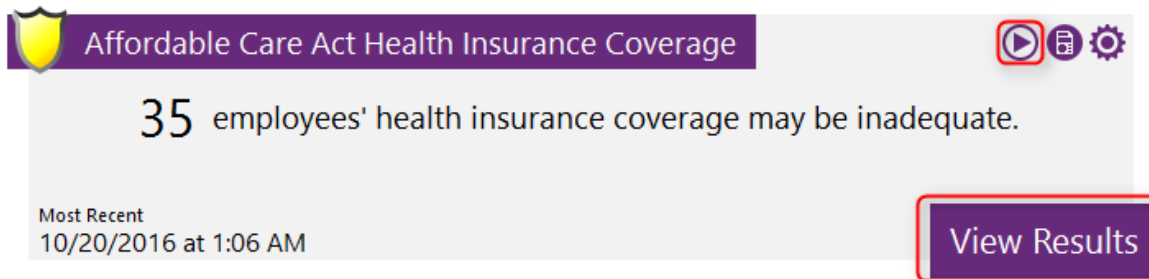
3.1.5. Affordability Groups

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

Affordable Care Act Employee Coverage Results

2016 Affordable Care Act Coverage Verification Results
The results of the employee coverage verification are shown below.

- 36** Aggregated employees' health insurance coverage was inspected
- 24** Aggregated employees are being offered adequate coverage according to the Affordable Care Act
- 0** Aggregated Non full-time employees have been offered and enrolled in self-insured coverage

Minimum Essential Coverage

69.44 % of aggregated full-time employees are being offered minimum essential coverage. You are required to cover at least 95% for the 2016 calendar year.

- 11** Aggregated employees are not being offered any coverage and are eligible
- 1** Aggregated employees' dependents are not being offered coverage

Inadequate Coverage

- 0** Aggregated employees are not being provided adequate coverage. You may be liable for a penalty for any employee not adequately covered.
- 0** Aggregated employees are not being offered minimum value
- 0** Aggregated employees are not being offered affordable coverage

Buttons: Quit, Next

Affordable Care Act Coverage Results

Affordable Care Act Coverage Verification Results
Reporting Year 2016
The results of the employee coverage verification are shown below.

93.10% of Full-Time employees are being offered Minimum Essential Coverage (MEC). You are required to cover at least 95% for the 2016 calendar year.

[View All Results](#)

| | | |
|--|--|--|
| 36 Employees' health insurance coverage was inspected | 27 Employees are being offered adequate coverage | 3 Non Full-Time employees have been offered and enrolled in self-insured coverage |
| 2 Employees are not being offered any coverage and are eligible | 2 Eligible employees are not being offered Minimum Essential Coverage (MEC) | 2 Employees are not being offered coverage for dependents |
| 2 Employees are not being offered adequate coverage | 2 Employees are not being offered Minimum Value (MV) coverage | 2 Employees are not being offered Affordable Coverage |

Upcoming Action Items

- 8** Employees that are now Full-Time and should be offered coverage by the start of the next stability period starting within the next month
- 16** Employees are trending 30+ hours/week in their current measurement

New Employees

- 0** New employees that should be offered coverage by the start of the next month

Note: You may be liable for penalties for any eligible employee that is not being offered coverage or coverage is inadequate. [Click here for additional IRS reference regarding ACA penalties.](#)

Buttons: Close

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

Affordable Care Act Employee Coverage Results

Affordable Care Act Coverage Verification Results

The results of the employee coverage verification are shown below.

Search Employees Show: Only Archer Employees All Employees

Yoel Harper Fully Covered

This employee is a new employee and is a member of a full-time by default group. They must be offered coverage 90 days after their hire date. They are in full-time stability period that started on 1/1/2015 and will end on 10/31/2016. This employee is currently being offered minimum essential coverage which does include dependents. This employee is being offered minimum value coverage that is affordable. This employee is assigned to an affordability group using the Federal Poverty Line Safe Harbor. [See full details.](#)

Full Time Status: Full-Time (as of 10/2/2014)
Stability Period: 1/1/2015-10/31/2016

Margery Marlin Fully Covered

This employee is a new employee and is a member of a full-time by default group. They must be offered coverage 90 days after their hire date. They are in full-time stability period that started on 1/1/2015 and will end on 10/31/2016. This employee is currently being offered minimum essential coverage which does include dependents. This employee is being offered minimum value coverage that is affordable. This employee is assigned to an affordability group using the Federal Poverty Line Safe Harbor. [See full details.](#)

Full Time Status: Full-Time (as of 10/2/2014)
Stability Period: 1/1/2015-10/31/2016

Junior Richins No Coverage

This employee is a new employee and is a member of a full-time by default group. They must be offered coverage 90 days after their hire date. They are in full-time stability period that started on 1/1/2015 and will end on 10/31/2016. This employee is not currently being offered minimum essential coverage. This employee is not being offered minimum value coverage. This employee should be offered minimum essential coverage and a plan that meets minimum value and is affordable. This employee is assigned to an affordability group using the Federal Poverty Line Safe Harbor. [See full details.](#)

Back Results 1 - 20 [Next \(21-33\)](#) >> Finish

New Coverage Results Reporting Grid

Affordable Care Act Coverage Results

93.10% of Full-Time employees are being offered Minimum Essential Coverage (MEC) **27** Employees are being offered adequate coverage **2** Employees are not being offered adequate coverage **2** Employees are not being offered any coverage and are eligible

Show: Only ARCHR Employees ACA Reporting Year: 2016

| Employee ID | First Name | Last Name | Determination | Line 14 Code | Line 15 Code | Line 16 Code | Affordable | Min. Essential | Min. Value | Dep Offered | Plan Details | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|------------|-----------|------------------------------|--------------|--------------|--------------|------------|---------------------------|--------------|-------------|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|----|----|----|----|----|----|----|----|----|----|----|----|---------|--|--|--|--|--|--|--|--|--|--|--|--|---------|--|--|--|--|--|--|--|--|--|--|--|--|
| 2016 1095-C Part II Employee Offer and Coverage | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th></th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> </tr> </thead> <tbody> <tr> <td>Line 14</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> <td>1A</td> </tr> <tr> <td>Line 15</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Line 16</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | | | | | | | | | | | | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Line 14 | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | Line 15 | | | | | | | | | | | | | Line 16 | | | | | | | | | | | | |
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Line 14 | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Line 15 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Line 16 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Alistair | Greene | Adequate Offer of Coverage | | | | Affordable | MEC, MV, Dependents Offer | Self-Insured | Waived | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Elston | Guillory | Inadequate Offer of Coverage | | | | Affordable | MEC, MV, Dependents Offer | Self-Insured | Waived | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Yoel | Harper | Inadequate Offer of Coverage | | | | Affordable | MEC, MV, Dependents Offer | Self-Insured | Waived | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Export to Excel [Reset Filters](#) Results 1 - 20 [Next \(21 - 36\)](#) >>

Back Close

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.

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Line 14 | 1H | 1H | 1H | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A |
| Line 15 | | | | | | | | | | | | |
| Line 16 | 2A | 2A | 2A | | | | | | | | | |

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

ACA Monthly Coverage
✕

Fitzjames Miller Monthly Coverage Currently receiving an adequate offer

This employee is a new employee and is a member of a full-time by default group. You have set the offer of coverage at 0 days after hire; the IRS requirement is 90 days. They are in full-time stability period that started on 6/1/2015 and will end on 10/31/2016. This employee is currently being offered minimum essential coverage which does include dependents. This employee is being offered minimum value coverage that is affordable. This employee is assigned to an affordability group using the Federal Poverty Line Safe Harbor.

Edit Employee Coverage Eligibility Details

| Offering | Eligible | Eligibility Start Date | Coverage Start Date | Coverage End Date | Employer Cost | Employee Cost | Enrollment | Dependents | Company |
|-----------------------------------|-------------------------------------|------------------------|---------------------|-------------------|---------------|---------------|------------|---------------|---------|
| Current Employee Coverages | | | | | | | | | |
| INS1 - MEC, MVP | <input checked="" type="checkbox"/> | 01/01/2015 | 01/01/2015 | 01/01/1900 | \$75.00 | \$51.21 | Enrolled | Employee Only | LANA |
| INS1 - MEC, MVP | <input type="checkbox"/> | 01/01/2015 | 01/01/2015 | 01/01/1900 | \$75.00 | \$51.21 | Enrolled | Employee Only | LANA |
| INS1 - MEC, MVP | <input type="checkbox"/> | 01/01/2015 | 01/01/2015 | 01/01/1900 | \$75.00 | \$51.21 | Enrolled | Employee Only | LANA |

2015 Employee Coverage Reporting

The chart below illustrates this employee's health insurance availability for 2015. It is based on your deduction codes within Dynamics as well as the benefit start and coverage dates you specified above. You will be required to file this information on form 1095-C in early 2016.

| 2015 Monthly Breakdown | January | February | March | April | May | June | July | August | September | October | November | December |
|---------------------------------------|---------|----------|-------|-------|------|------|------|--------|-----------|---------|----------|----------|
| Minimum Essential Coverage Self | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Minimum Essential Coverage Dependents | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Minimum Value Offering | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Affordable Minimum Value Offering | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 1095-C Line 14 Code | 1H | 1H | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A | 1A |
| 1095-C Line 16 Code | 2A | 2A | | | | | | | | | | |
| Company Reporting Coverage | LANA | LANA | LANA | LANA | LANA | LANA | LANA | LANA | LANA | LANA | LANA | LANA |

✓ Coverage Offered
✗ Coverage Not Offered
✓ No Coverage Requirement
✓ Expect Coverage to be Offered
✗ Expect Coverage Not to be Offered

Cancel
Save

New Employee Coverage Details

Affordable Care Act Coverage Details
✕

Neva Burgan BURG0001 Currently receiving an adequate offer

This employee is full-time as of 4/16/2016 and is in a full-time stability period that started on 8/1/2016 and ends on 12/31/2017. This employee is currently being offered minimum essential coverage which does include dependents. This employee is being offered minimum value coverage that is affordable. This employee is assigned to an affordability group using the Federal Poverty Line Safe Harbor.

| Offered Plan Group | Enrolled | Employee Only Monthly Cost |
|--------------------|----------|----------------------------|
| New Group | ✓ | \$ 100.00 |
| INS1 | | |
| INS2 | | |
| INS3 | | |
| INS4 | | |
| plan 2 | ✗ | \$ 170.00 |
| INS | | |
| INS5 | | |
| INSBEN | | |

[Add Coverage Offer Enrollment](#)

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

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?](#)

Cancel
Save

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.

Offered Plan Group | **Enrolled** | **Employee Only Monthly Cost**

| | | |
|----------------------|---|-----------|
| [-] New Group | ✓ | \$ 100.00 |
| INS1 | | |
| INS2 | | |
| INS3 | | |
| INS4 | | |
| [-] plan 2 | ✗ | \$ 170.00 |
| INS | | |
| INS5 | | |
| INSBEN | | |

[Add Coverage Offer Enrollment](#)

2016 Employee Coverage Requirements
The chart below illustrates this employee's health insurance requirements for 2016. It is based on the employee's you have fulfilled your requirements to offer this employee adequate coverage under the Affordable Care Act.

Add Coverage Offer & Enrollment

Select a Plan Group from the drop-down list below to indicate this employee received an Offer of Coverage for this Plan Group, which includes all plans/coverage levels:

New Group

This employee already has an offer indicated for the selected Plan Group. [Cancel] [OK]

| | | | | | | | | |
|-----------------------------------|---|---|---|---|---|---|---|---|
| Minimum Value Offering | ● | ● | ● | ● | ● | ● | ● | ● |
| Affordable Minimum Value Offering | ● | ● | ● | ● | ● | ● | ● | ● |

● Coverage Offered ● No Offer of Coverage

Plan Offer and Enrollment

Add an Offer and Enrollment below and then select a plan code from the drop-down list to indicate the coverage level plan for which the employee was offered coverage. There may be multiple plan offers and/or enrollments during a given plan year if the employee changed coverage levels due to a Qualifying Life Event or if you follow a non-calendar year plan. You may not, however, have overlapping dates of offers within the same plan group or enrollment across all plan groups. To indicate that an employee enrolled in the offered coverage for a given date range, check the 'Enrolled?' checkbox

| Plan Code | Start Date: | End Date: | Employee Only Monthly Cost: | Enrolled? | |
|---------------------------|-------------|------------|-----------------------------|-------------------------------------|------------------------|
| Edit INS5 | 1/31/2016 | 9/31/2016 | \$95.62 | <input checked="" type="checkbox"/> | Delete |
| Edit INS5 | 10/ 1/2016 | 12/31/2016 | \$85.00 | <input type="checkbox"/> | Delete |

[Add New Offer Dates and Costs](#)

[Cancel] [Save]

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.

1095-C Part II 1095-C Part III

The chart below gives a preview of what this employee’s Part III (Covered Individuals) on their 1095-C form will look like. This section includes all Covered Individuals, including the employee themselves, spouse, child(ren), and other dependents, who were enrolled in the self-insured plan for any calendar month of the calendar year. You can click on a Covered Individual’s name below to edit their personal information, as well as the months in which they were enrolled.

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|--------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Nancy Buchanan | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| John Buchanan | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | | | | |
| Sally Buchanan | ✓ | ✓ | | | | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

[Add Covered Individual](#)



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.

✕ Edit Covered Individual
✕

Covered Individual Details

First Name

Relationship

Birthdate

Last Name

SSN

Enrolled Coverage Dates
GP

Edit

Start Date

End Date

Delete

1095-C Part III Preview
Reporting Year: 2016

| | | | | | | | | | | | |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | | | | |