Look-Back ACA Workflow

Important: Category and Medical Plan(s) must be set up prior to this process.

New Hires & Rehires

Enter all new hires and rehires through the Human Resource Module. Set their ACA Employee Type according to how you have hired the employee.

Variable hour:

An Employee whose hours of service are variable. It is uncertain if the employee will work an average of 30 hours per week. This setting will allow the employee to be calculated by the Lookback Eligibility Report.

Seasonal:

An Employee who performs labor or services on a seasonal basis. This setting will allow the employee to be calculated by the Lookback Eligibility Report.

Part Time:

Employee who is employee under an average of 30 hours of service per week. This setting will allow the employee to be calculated by the Lookback Eligibility Report. **Full Time:**

An employee who is expected to average at least 30 hours of service per week and you have hired as a permanent employee. The employee will NOT be calculated by the Lookback Eligibility Report.

HR Employee V	liew									
Account #:	135 Nam	e Key: RUIZ GU	STA0114	Social Security #			?	4	Active PIN	4:
Employee Info njuries Credit (Deductions Tota Cards Equipment	ls Notes Dire ACA	ct Deposit Dep	endents Health I	Benefits Medical	Emerg Contact	s Training Co	mplaints L	tigation Wa	arnings
Date Hired:		First Da	te Worked:		Date Terr	minated: 11/07/	2008			
Date Rehired:		Date L	ast Worked:							
Туре	Measure Start	Measure End	Admin Start	Admin End	Stability Start	Stability End	Offered On	Hours	Status	^
		1								~
Add	Edit	_								
		ACA Category:								
	ACA E	mployee Type	Unassigned/Unk	nown 🗸						
	ALE M	lember Status:	Unassigned/Unk	nown me	mber 🗸					
			Calculated Part T	me						
			art Time	rs rec	uirement					
			easonal (ariable Hour	ACA	eligibility					
	Mor	nths Oualified:	First Month E	indina:						

Managing & enter benefits for Full Time employees

With the Look-back method any employees you hire as known permanent, full time employees automatically qualify for coverage (in general, coverage should be provided within 90 days of their hire date but your company may choose to enroll them sooner as a matter of policy). Unlike seasonal, part time and variable hour employees, full time employees are not processed through the ACA Look-back Eligibility Report. When you hire a new full time employee, you should manually add a Health Benefit record that indicates the employee's starting coverage date. For those hired as full time employee, their ACA Employee Type should be set to Full Time. This setting will remove them from Look-back eligibility calculation.

To manually enter a benefit record, bring up the employee on the **HR Employee View** window and click on the Health Benefits tab page. Click **Add** button then Click **Select Plan...** button to select the desired plan.

Note: Do not use drop down menus for the Benefit Provider or Benefit Plan. Always use the "Select Plan" button.

Enter the starting and ending coverage dates in the **Accepted** section. If spouse or dependent coverage is selected, check the appropriate boxes.

Note: Ensure all covered dependents are entered in Dependents.

Make sure the **Active** box is checked, and click on the **Save** button. This record will now appear on the **Benefit Eligibility Review** window and the employee will be included in the enrollment file when it is created. The deduction amount will also now appear on the Deductions tab but will be governed by the Benefit Record.

Enter Insurance Covera	age			23
Employee: MA	GDALENA	Pre-Enr	ollment	
Benefit Provider: Blu	ie Corss	✓ Select PI	an	
Benefit Plan: PP	O Pre-Tax	~		
Date Eligible: 06/	01/2019	Date Offer	ed: 06/01/2019	
	Appl. Not Returned	Appl. Returned ()n:	
Declined:	ippii not netainea			
	Declined Employee C	Coverage 🗌 Dec	lined Dependent	Coverage
	Declined Spouse Cov	rerage Con	ered on Spouse'	s Plan
Spouse's Employer:				
	Other reason for decl	ining employee co	/erage:	
Explanation:			^	
			\sim	
Accepted:		1		
Starting Date:	07/01/2019	Ending Date: 07/	31/2019	When Part Time
	Spouse Insured		Children Insured	
Employee Cost:	50.00 %:	100.00 Amount	: 50.00	Ded. #: 67
Depend Cost:	%:	Amount	:	Ded #:
		Total Deduction	: 50.00	Per: Month 🗸
Life Ins. Beneficiary:				Section 125
Comments				
comments.				
			~	
✓ Active				Save Cancel

Run Initial ACA Lookback Eligibility Report

The Look-back Eligibility Report is designed to identify whether each employee that worked in a measurement period is a Calculated Full Time or Calculated Part Time employee. Calculated Full Time employees are entitled to an offer of coverage once they have been identified as such; Calculated Part Time employees are not owed an offer of coverage, but your company may choose to offer them coverage as a matter of policy.

		Eligibilit	y
🛃 ACA Lookback	Eligibility Report		- • 💌
Ending Date:	03/31/2018		
Eligibility Date:	04/01/2018		
Category:	LOOKBACK		
	Transition (Monthly to L	ookback)	
	Print Measurement Perio	ds in Progress	
	Print Employees With	Zero Hours	
	Print Terminated Employ	ees	
Ac	tions:		
	Update Hours/Status		
	Extend Enrollment Dates	for Full Time/Alrea	dy Enrolled
	Create Offer Records for	Employees Not Enro	olled or Declined
F	Preview Print Setup	Print	Cancel

To run the Look-back Eligibility Report go to ACA > Lookback

Select "**Print Measurement Periods in Progress**" & "**Print Terminated Employees**" then click on Preview to run the ACA Lookback Eligibility Report. The report will give you only the data and will not change any data in the employee's file. Review this first report and make any necessary data correction changes.

Note: Do not select the Transition (Monthly to Lookback) unless instructed by Datatech.

Run Final ACA Lookback Eligibility Report

Once you have ensured all payroll and status data are correct, run the report a second time with the following check-boxes selected: "Update Hours/Status" & "Create Offer Records for Employees Not Enrolled or Declined". The program will create an "Offer" record in the benefit tab for all employees that are full time, but who do not have a status indicating that they have enrolled or declined coverage.

코 ACA Lookback	Eligibility Report	
Ending Date:	03/31/2018	
Eligibility Date:	04/01/2018	
Category:	LOOKBACK	
	Transition (Monthly to Lookback)	
	Print Measurement Periods in Progress	
	Print Employees With Zero Hours	
	Print Terminated Employees	
A	ctions:	
	Update Hours/Status	
	Extend Enrollment Dates for Full Time/Alre	eady Enrolled
	Create Offer Records for Employees Not E	nrolled or Declined
	Preview Print Setup Print	Cancel

Make an offer of coverage to newly eligible employees

Newly eligible calculated full time employees are due an offer of coverage, and this offer of coverage must be recorded on the Health Benefits tab page of the Employee setup window in the HR program. In turn, this offer of coverage will be used to report the correct codes on the 1095-C that is issued at the end of the year.

The "Offer" or "Offered/No Response" records can be used to help manage the offer process. By selecting these from the status menu, you can see which employees need to be given offers of coverage in the Benefits Eligibility Review window, print a list, and/or export these employees to Excel.

Provide each eligible employee with an offer of coverage Form which contains the information on the health insurance plan(s) available to them. In the form provide the employee can indicate whether he wants to accept or decline coverage. If coverage is accepted, the employee will need to fill out the carrier application forms for the plan that is selected. Note: Forms may be provided by your carrier or broker.

Benefit Eligibility Review									- 8
arting Eligible Date: / /	Coverage Start On: / /	Cov	erage As Of: / /	Statu	s: Offered/No Respon	nse v Dept.:		\sim	
nding Eligible Date: //	Coverage End On: / /	Ending D	ate Offered: / /	Medical Pla	n: ALL	~	Show Inactive		
Empl # Last Name	First Name	Date Eligible	Date Offered	Start Date	End Date	Pre-Enroll	Insurance Co	Insurance Plan	Declined
2 RESENDIZ ALONSO	JOSE	3/1/2018	3/1/2018				United Ag	PRR	
4 ORTIZ	OSCAR RAMIREZ	3/1/2018	3/1/2018				United Ag	PRR	
683 UBALDO DE JESUS	LORENZA	5/1/2018	5/1/2018				UNITED AG	PBS	
1030 JUAREZ SOLANO	FELIPE	3/1/2018	3/1/2018				United Ag	PRR	
1033 GOMEZ ORTIZ	MARTIN	3/1/2018	3/1/2018				United Ag	PRR	
1066 GOMEZ ORTIZ	SILVIA	3/1/2018	3/1/2018				United Ag	PRR	
1292 UBALDO	FELICITAS	3/1/2018	3/1/2018				United Ag	PRR	
1400 PARAMO GUERRERO	ARTEMIO	3/1/2018	3/1/2018				United Ag	PRR	
1625 GRACIDA	ROSARIO	3/1/2018	3/1/2018				United Ag	PRR	
1678 LAGUNAS	ARACELI	3/1/2018	3/1/2018				United Ag	PRR	
1679 MELENDEZ	PEDRO	3/1/2018	3/1/2018				United Ag	PRR	
2127 GOMEZ ORTIZ	JUAN	3/1/2018	3/1/2018				United Ag	PRR	
2183 RUIZ	CARLOS	3/1/2018	3/1/2018				United Ag	PRR	

Edit offer/No Response Records

Once you have made an offer of coverage to the employees, you can edit the "Offer/No Response" record to indicate whether the employee will be enrolled in coverage or has declined.

Decline Record

Select the employee's "Offer/No Response" record and click on Edit. Select "Declined Employee Coverage" the two other checkboxes are available for recording the employee's decision to decline spouse and dependent coverage. It is not necessary to check these; you may assume that if an employee declines selfcoverage, the employee is declining the additional coverage tiers as well. But you may sue them if desired.

On a decline record, it is not necessary to select a plan, and the Pre-Enrollment check box does not apply. The decline record should have the Active box checked in the bottom left corner of the window.

If the employee decides to enroll in coverage at a later time, you can deactivate the previously entered decline record, and enter a new Active Coverage benefit record to indicate the employee's plan choices. You may wish to enter a note or explanation on the decline record for your reference to note that employee has now chosen coverage.

· · · · · · · · · · · · · · · · · · ·	
Enter Insurance Coverage	23
Employee: OSCAR RAMIREZ	
Benefit Provider: United Ag	
Renefit Plan: DPR	
Date Eligible: 03/01/2018 Date Declined: 03/01/2018	
Appl. Not Returned Appl. Returned On:	
Declined:	
Declined Spouse Coverage	
Spouse's Employer:	
Other reason for declining employee coverage:	
Explanation:	
- Accepted:	
Starting Date: Ending Date: Keep Enrolled	ł
Spouse Insured Children Insured When Part Tim	e
Employee Cost: 677.82 %: 0.00 Amount: 0.00 Ded. #: 0	
Depend Cost: 0.00 %: 0.00 Amount: 0.00 Ded #: 0	
Total Deduction: 0.00 Per: Month	
Life Ins. Beneficiary: Monthly Max: 0.00	
Comments:	
×	
Active Save Cancel	5

Coverage Record

Select the employee's "Offer/No Response" record and click on **Edit**. The Benefit Provider and Benefit Plan fields will be populated by the medical plan you have set to "Default" in the Medical Plan set up. The Date Eligible and Date Offer will also be populated according to the dates you entered in the Lookback Eligibility Report. If the employee has selected a different plan than the default one, you can select the desired plan form the **Select Plan** button. Enter the starting and ending coverage dates in the **Accepted** section. If spouse or dependent coverage is selected, check the appropriate boxes. Ensure the Active check box is selected.

Note: Do not use drop down menus for the Benefit Provider or Benefit Plan. Always use the "Select Plan" button.

Note: Ensure all covered dependents are entered in Dependents.

Enter Insurance Covera	age				23
Employee: OS	CAR RAMIREZ	Pre-	Enrollment		
Benefit Provider: Un	ited Ag	✓ Selec	t Plan		
Benefit Plan: PR	R	~			
Date Eligible: 03/	01/2018	Date O	ffered: 03/01/2018		
	Appl. Not Returned	Appl. Returne	ed On:		
Declined:		·			
	Declined Employe	coverage	Declined Dependent	Coverage Plan	
Spouse's Employer:					
	Other reason for a	leclining employee	coverage:		
Explanation:			~		
			\sim		
Accepted:	03/01/2018	Ending Date:	02/28/2020	1	Keep Enrolled
	Spouse Insured		Children Insured	J	When Part Time
Employee Cost:	677.82 %:	0.00 Amo	unt: 0.00	Ded. #:	0
Depend Cost:	0.00 %:	100.00 Amo	unt: 0.00	Ded #:	0
		Total Deduct	tion: 0.00	Per:	Month ~
Life Inc. Beneficiano				Monthly Max:	0.00
Commonter				intenting intest	Section 125
Comments:					
			~		
Active 🗸				Save	Cancel

Application Not Returned

In cases where the employee does not give an immediate answer, you can select **Appl. Not Returned** and make the records active. If the employee decides to accept coverage later on, you can make this record inactive and create a coverage record.

Enter Insurance Co	overage	
Employee:	OSCAR RAMIREZ	Pre-Enrollment
Benefit Provider:	United Ag	✓ Select Plan
Benefit Plan:	PRR	~
Date Eligible:	03/01/2018	Date Offered: 03/01/2018
Γ	Appl. Not Returned	Appl. Returned On:
Declined:	Declined Employ	In Coverage Description Coverage
	Declined Spouse	Coverage Covered on Spouse's Plan
Spouse's Emplo	yer:	
	Other reason for	declining employee coverage:
Explanati	on:	^
		~
Accepted: Starting D:	ate:	Ending Date: Keep Enrolled
	Spouse Insured	Children Insured When Part Time
Employee C	ost: 677.82 %	6: 0.00 Amount: 0.00 Ded, #: 0
Depend C	ost: 0.00 %	: 100.00 Amount: 0.00 Ded #: 0
		Total Deduction: 0.00 Per: Month
Life Inc. December		Monthly May: 0.00
Lite ins, Beneticia	iry:	
Comme	nts:	A Section 125
		×
Active 🗸		Save Cancel

Finalize enrollment information and submit enrollment

The look-back Eligibility Report normally manages and extends End Dates automatically. Under some circumstances, you may need to either extend the enrollment dates of employees manually on the Benefit Eligibility Review window and/or review enrolled employees to make sure that all employees are still working. If any employees have been laid off or otherwise terminated and their enrollment record was set up to cover the entire stability period, you may need to edit the ending enrollment date to reflect when their coverage was terminated.

Create Enrollment

Once your benefit records are filtered to show only those who will be enrolled for the following month, click **Create Enrollment** to create an enrollment file. An enrollment file consists of a record for each employee that has accepted coverage along with a record for each covered spouse and dependent. The enrollment file then can be electronically exported to your insurance company.

Before creating the enrollment file, use the filters to enter the **Coverage End On** date for the enrollment you are creating, and select **Accepted** from the **Status** filter at the top of the window. This will ensure that only employees who are eligible for coverage through the ending date and who have accepted coverage will be included in the enrollment file.

· · ·	,			_							
ng Eligible Da	ate: /	/ Covera	ge Start On: / /	Coverage	As Of: / /	Status:	Accepted	↓ Dept.:		\sim	
ng Eligible Da	ate: 🖊	/ Cover	age End On: 07/31/2019	Ending Date C	Offered: / /	Medical Plan:	ALL	\sim	Show Inactive		
Empl # A	Active	Last Name	First Name	Date Eligible	Date Offered	Start Date	End Date	Pre-Enroll	Insurance Co	Insurance Plan	Declined
3053		REYES	LUCIANO REYES	6/1/2016		1/1/2016	7/31/2019		UABT	PB +	
3085	\checkmark	MENDOZA	PEDRO BASURTO	5/1/2015	4/15/2015	5/1/2015	7/31/2019		UABT	PB +	
3181	\checkmark	GARCIA	LIBRADO SALVADOR	7/1/2015	6/11/2015	7/1/2015	7/31/2019		Sakakihara	Dental plan	
3209	\checkmark	NOLASCO	JOSE J.	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
3639	\checkmark	DONOSO	CRISTOBAL MATA	6/1/2016	5/20/2016	6/1/2016	7/31/2019		UABT	PB +	
3709	\checkmark	ORTIZ	GERARDO CRUZ	8/1/2016	7/14/2016	8/1/2016	7/31/2019		UABT	PB +	
3710	\checkmark	LOPEZ GONZALEZ	RUBEN	8/1/2016	7/14/2016	8/1/2016	7/31/2019		UABT	PB +	
9016	\checkmark	HERNANDEZ	HECTOR	1/1/2015	12/14/2014	1/1/2015	7/31/2019		UABT	PB +	
9021	\checkmark	HERNANDEZ	ROBERTO MORALES	1/1/2015	12/12/2014	1/1/2015	7/31/2019		UABT	PB +	
9051	\checkmark	GARCIA-VENCES	JAIME	1/1/2015	12/12/2014	1/1/2015	7/31/2019		UABT	PB +	
9053	\checkmark	AGUIRRE	JOSE BAUTISTA	1/1/2015	12/12/2014	1/1/2015	7/31/2019		UABT	PB +	
9054	\checkmark	ROMAN	PEDRO ROMAN	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
9059	\checkmark	GABRIEL	MIGUEL GIJON	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
9060	\checkmark	CHAVEZ	ANGEL SANTIAGO	1/1/2015	12/12/2014	1/1/2015	7/31/2019		UABT	PB +	
9066	\checkmark	CORTES	SERGIO	1/1/2015	12/12/2014	1/1/2015	7/31/2019		UABT	PB +	
9071	\checkmark	ISIDRO HUERTA	VICTOR HUGO	1/1/2015	12/12/2014	1/1/2015	7/31/2019		UABT	PB +	
9072	\checkmark	MARTINEZ-B	OSCAR	1/1/2015	12/12/2014	1/1/2015	7/31/2019		UABT	PB +	
9074	\checkmark	GABRIEL	GABRIEL GIJON	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
9145	\checkmark	CORONA	GERARDO	1/1/2015	12/14/2014	1/1/2015	7/31/2019		UABT	PB +	
9211	\checkmark	SALDIVAR PALMERIN	ALAN J	2/1/2016	1/27/2016	2/1/2016	7/31/2019		UABT	PB +	
9252	\checkmark	FLORES	RUFINO ROCETE	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
9268	\checkmark	FLORES	JOAQUIN ROCETE	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
9272	\checkmark	ROCETE	ALBERTO FLORES	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
9312	\checkmark	ORTIZ	ELEAZAR CRUZ	2/1/2015	1/15/2015	2/1/2015	7/31/2019		UABT	PB +	
9543	\checkmark	GUZMAN	JORGE LOBATO	9/1/2015	8/13/2015	9/1/2015	7/31/2019		UABT	PB +	
9586		REYES	GERARDO RIVERA	5/1/2015	4/15/2015	5/1/2015	7/31/2019		UABT	PB +	

When the enrollment file is created, several checks are made for valid data. A message will appear on your screen if there are any actual or potential problems (See Image 2). An exception report will be generated listing these items and you can then make adjustments as needed (See Image 3).



For instance, if you have indicated that an employee has opted for spouse coverage, but no spouse record was entered on the employee's account, an exception will be generated.

Coverage	Ending: 07/31/2019	Create Enrollment Exception Report
Acct #	Employee Name	Problem
9051 9733 9866 3	GARCIA-VENCES, JAIME LOPEZ, FRANCISCO ORTIZ INFANTE, ROBERTO R Total Exceptions	Dependent coverage indicated but no children/dependents found. Employee FRANCISCO LOPEZ: missing City/State/Zip Employee ROBERTO INFANTE: missing DOB

Missing data such as addresses or date of birth will be reported on the Exception Report. If you do not have the information, you may need to submit the file with the information missing. Each insurance company or third party administrator may handle missing data differently. For instance, it may be impossible to enroll an employee with a missing address because the insurance company doesn't have anywhere to send the insurance card or other plan documents. An employee may be enrolled without a date of birth, but may be unable to fill prescriptions because the data of birth is required by the pharmacy. SSN are usually required for the employee. However temp SSN are accepted for dependents.

The enrollment file can be created more than once. If you have exceptions that need to be corrected, you should make those corrections and click on the Create Enrollment button again to recreate the enrollment file with the corrected data. Once all errors have been corrected you can then proceed to export and upload your enrollment file to your insurer. See the **Export Enrollment Data** section for more information on this process.

Customize

A PDF report can be printed from the **Benefit Eligibility Review** window. It can also be customized to include both the date terminated and last check date, among other datasets, to assist you in reviewing benefit records.

Click the Customize button in the lower right corner, then select the Columns button. The window shown below will open, allowing you to choose which fields you wish to appear on the report, and in which order you want the columns to appear.

Select Report Columns			×
Available Fields:		Selected Fields:	
ACA Type]	Total Records	
Active		Employee Name	
Birth Date		Data Eligible	
City		Date Offered	Move to Beg.
Comments		Starting Date	
Crew ID	Add ->	Starting Date	Move Up
Date Terminated		Ending Date	
Decline Expires	C Damasura	Pre Enroll	Maria Davia
Department	<- Kemove	Ins. Comp Name	Move Down
Depend Cost		Deal Calf	A
Depend Cost		Decl. Sell	iviove to End
Depend Share		Deal Child	
Dependent Coverage		Deci, crilla	
Employee Active			
Employment Type			
Gender			
Hire Date			
Insurance Department			
Koon Enrolled			
Last Chack Data			
Last Robico Date			
Life Penefician			
Line #			
Mailing Addross			
Position			
Poston Terminated			
Solf Cost			
Solf Dod #			
Sell Ded #			
Sell Share			
Spouse Coverage			
Tatal Daduation			
Zip			
			Properties
			riopenies
		Ok	Cancel
		- OK	

All fields shown in the Selected Fields side of the window will appear in the column order shown.

Export Enrollment File

Go to Health Insurance > Export Enrollment File

This option will export the enrollment data to a file that can be submitted to an insurer or TPA (Third Party Administrator). The enrollment file includes information on all the employees that are covered by a plan as well as the dependents (spouse and children) for employees, if applicable.

Note: For this example we will use the Custom Excel format. For assistance with other formats press F1 to bring out the HELP window and search for the desired format.

- 1. Select the Custom Excel (See image 1). Once this has been selected, the program will remember the format to use.
- 2. If you desire to modify the columns that are included in the export file and/or the order in which they are output, clicking on the Customize button (See image 2).
- Select the folder for the program to use when creating the enrollment file form the File Look Up button. A copy of the enrollment file will remain in your system as long as the filename is not reused.

4. Insurers may have specific requirements for naming the enrollment files. The Filename Template allows you to enter a naming system for the program to use when creating the enrollment files. The Filename 2 Template is only necessary if your insurer requires sending employees and dependents in separate files.

The following special codes can be used in the template:

<yyMM> - The coverage date year and month (starting date of coverage).

<COMPANY_NUM> - Your company number from the medical plan setup.

 ${\scriptstyle\mathsf{<FROM_MMDD>}}$ - The coverage date; month and day of the month.

 ${\scriptstyle < TO_MMDD>}$ - The ending coverage date; month and day of the month.

<create_date> - The date that the enrollment file was create in MMDDYY format.

So for instance if your insurer wants your file to be named with your Group ID (which for this example is "DATATECH", the coverage year and month, the word "Enrollment", and the creation date of the file, you could enter:

DATATECH_<YYMM>_Enrollment_<CREATE_DATE>.CSV

This would produce the following filename for an enrollment file for January 2015 that was created on Dec. 13, 2014:

DATATECH_1501_Enrollment_121314.CSV

Once you have formatted the enrollment data as desired, click **Export Enrollment** to export the enrollment data.

0		o export the t	emonnent uata.	
m Export Enrollment Data		- • •		
Enrollment Export Format:	Custom Excel ~	Customize	Multiplo	
Save In:	<undefined> AlG/Chimienti RA&IS</undefined>	D	format options	S
Filename Template:	Custom CSV			
Filename 2 Template:	Custom Excel FreedomCare Pan American			
SFTP/FTP Server or Email Address:	Transwestern 834			
SFTP/FTP Username	Western Growers (Pinnacle TPA) 834 Western Growers (Pinnacle TPA) Flat File			
SFTP/FTP/ZIP Password:	Test Connection			
SFTP/FTP Destination Folder:	/]		
EDI Time Zone Code:	17			
	Email Attachment: Compressed File (ZIP)			
Export Batch #:	15			
	Test (834)			
	CR/LF 834			
	Export Enrollment			

Image 1

Image 2

📨 Export Enrollment Data			Select Report Columns			
Enrollment Export Format: Custom Excel	✓ Customize		Available Fields:		Selected Fields:	
Save In: H:\Documents\Brenda\Testing Resports			Address Line 2		Company # Group #	
Filename Template:	Customize Report S	iettings ×	Enroll Count		Policy # Insured SSN	Move to Beg.
Filename 2 Template:	Title	Enrollment Export New Report	Life Ins Beneficiary	Add ->	Record Type First Name	Move Up
SFTP/FTP Server or Email Address:	Top Margin:	Left Margin:		<- Remove	Middle Name Last Name	Move Down
SFTP/FTP Username	Bottom Margin:	Right Margin:			Sex Date of Birth	Move to End
SFTP/FTP/ZIP Password: Test Connecti	n Orientation:	Automatic V Font Size: 7			Address Line 1 City	
SFTP/FTP Destination Folder: /	Font	Select			State Zip	
EDI Time Zone Code: 17		Columns Ordering Subheadings Subtotals			Coverage Date Coverage Choice	
Email Attachment: Compressed File (ZIP)					Dependent SSN Medical Plan	
Export Batch #: 15		Ok Cancel			Date of Hire Phone #	
Test (834)					Relationship Coverage Tier	
CR/LF 834						
Export Enrollment						
						Properties
					01	Cancel

Use the Terminate & Rehire buttons daily

Terminate:

When an employee is terminated or laid off, several changes are typically made to the employee's account. The terminate button at the bottom left corner of the Employee's window provides a shortcut for handling this.

During the termination process the program will verify if a benefit record reflecting coverage is active. If so, it will ask you if you wish to change the ending date to reflect the end of the month in which you are terminating the employee. This will ensure the employee does not continue receiving coverage after he has been terminated.

In cases where the employee is terminated before his coverage is set to begin the program will ask you if you would like to cancel coverage. It is recommended to answer "yes" so the benefit record is deleted.

Rehire:

Use the ACA Status button on the Rehire window and the program will check the employee's previous work dates and status to let you know if the employee can be treated as a new employee or is a continuing employee. If the employee is a continuing employee, then the status will be checked and the program will create a health benefit record to enroll the employee in coverage if the employee 1) was a full time employee and 2) was previously enrolled.