

ACA Workflow Best Practice

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

Offer at the time of hire or during rehire process

At the time of processing a new hire or a rehire make an offer to the employee that is conditional on meeting the full time employee requirements of the ACA.

Note: For Rehires use the Rehire Button & follow the process.

The image shows a screenshot of an HR system interface. On the left is the 'HR Employee View' window, and on the right is a 'Rehire Employee' dialog box. The 'Rehire Employee' dialog box is the primary focus, showing fields for Name (ROBERTO MORENO), Date Rehired (06/20/2019), Code (Rehired), Description, Crew # (10), Pay Rate (11.00 Hourly), and various ACA-related fields. The 'ACA Status...' and 'Sick Pay Status' buttons are highlighted with red boxes. The 'Rehire' button in the background window is also highlighted with a red box.

Field	Value
Name	ROBERTO MORENO
Notes	
Date Rehired	06/20/2019
Code	Rehired
Description	
Crew #	10
Pay Rate	11.00 Hourly
Request ID Badge	<input type="checkbox"/>
ACA Status...	ACA Status...
Sick Pay Plan ID	PSL
Sick Pay Status	Sick Pay Status
Sick Pay Anniversary	
Sick Pay Available	
Prior Yr Carryover	0.00
Sick Pay Accrued	0.00
Sick Pay Used	0.00
Unused Sick Pay	0.00

Record Employee's answer by creating pre-enrollment or decline record

Pre-enrollment record:

If the employee elects to enroll into a plan other than the default, or wishes if or when they become eligible to add spouse and/or dependent coverage then a pre-enrollment record should be entered with the employee's health insurance choices. The ACA Hour Eligibility Report will then use this pre-enrollment record to enroll the employee in the coverage selected when he becomes eligible. Note: Dependent information must be entered in the dependents tab.

The screenshot shows the 'Enter Insurance Coverage' form with the following fields and values:

- Employee: EVA
- Pre-Enrollment
- Benefit Provider: Blue Corss
- Benefit Plan: PPO Pre-Tax
- Date Offered: 06/21/2019
- Appl. Not Returned
- Declined: Declined Employee Coverage, Declined Dependent Coverage, Declined Spouse Coverage, Covered on Spouse's Plan
- Spouse's Employer: (empty)
- Explanation: (empty)
- Accepted: Starting Date: (empty), Ending Date: (empty), Spouse Insured, Children Insured, Keep Enrolled When Part Time
- Employee Cost: 50.00, Ded #: 67
- Depend Cost: 162.50, Ded #: 67
- Total Deduction: 212.50
- Per: Month
- Section 125
- Life Ins. Beneficiary: (empty)
- Comments: (empty)
- Active
- Save (highlighted)
- Cancel

You can select dependent coverage at this time. Note dependent information must be entered in the dependents tab.

Decline:

If an employee declines coverage during the pre-enrollment process, enter a decline record on the employee account. The ACA Hour Eligibility Report will place the employee in the Declined section.

When an employee declines coverage, enter a record with the "Declined Employee Coverage box checked". 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 self-coverage, the employee is declining the additional coverage tiers as well.

On a decline record, it is not necessary to select a plan. The decline record should have the Active box checked in the bottom left corner of the window.

Decline Record

Employee: EVA Pre-Enrollment
Benefit Provider: Select Plan...
Benefit Plan:
Date Eligible: Date Declined: 06/21/2019
 Appl. Not Returned Appl. Returned On:
Declined:
 Declined Employee Coverage Declined Dependent Coverage
 Declined Spouse Coverage Covered on Spouse's Plan
Spouse's Employer:
 Other reason for declining employee coverage:
Explanation:
Accepted:
Starting Date: Ending Date: Keep Enrolled When Part Time
 Spouse Insured Children Insured
Employee Cost: %: Amount: 0.00 Ded. #:
Depend Cost: 0.00 %: 100.00 Amount: 0.00 Ded. #:
Total Deduction: 0.00 Per: Month
Life Ins. Beneficiary: Section 125
Comments:
 Active

Tip: To quickly add multiple decline records for more than one employee go to Health Insurance > Benefit Eligibility Review > Add Decline (bottom left corner). Enter the Employee's ID or lookup the employee by clicking on the Employee look up button, then enter the decline date as the date on the signed form which indicates a decline.

Account #:
Social Security #:
Last Name:
First Name:
Date Declined:
 Declined Self
 Declined Spouse
 Declined Child
 Active

Manually entering benefit records for special circumstances

In most cases, enrollment of employees will be handled automatically by the ACA Hour Eligibility Report. There may be some cases, however, where you will need to manually add a benefit record to an employee account to enroll that employee. For instance, if management decides to extend coverage to certain employees that would not otherwise qualify under the ACA rules, you can enter

a benefit record manually to enroll these employees. *Note:* If less stringent rules are used to determine eligibility contact Datatech Support for assistance in revising your HR setup for automatic application of your rules.

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 on the **Add** button. Click on the **Select Plan...** button to select the plan to enroll the employee in. *Note:* Do not use drop down menus for the plan name and carriers. 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 on dependents tab. Verify that the deduction amount frequency, and deduction number are correct, and check the Keep Enrolled when part time box if you would like the ACA Hour Eligibility Report to continue enrollment even if the employee does not meet the requirement for full time status. 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.

The screenshot shows the 'Enter Insurance Coverage' window. Key fields include: Employee: MAGDALENA; Benefit Provider: Blue Corss; Benefit Plan: PPO Pre-Tax; Date Eligible: 06/01/2019; Date Offered: 06/01/2019. The 'Accepted' section shows Starting Date: 07/01/2019, Ending Date: 07/31/2019, Employee Cost: 50.00, and Deduction: 50.00. The 'Active' checkbox is checked, and the 'Save' button is highlighted.

Entered Payroll

In order for the program to evaluate the employee's hours of service payroll must be entered for the month in question. The hours of the last date of the month should be at least in the batch or daily payroll.

Run ACA Hour Eligibility report with no check boxes

Employees are identified as full or part time based on the hours of service for a measurement period. The ACA Hour Eligibility Report is designed to identify whether each employee that worked in a measurement period is a full or part time employee. Full time employees are entitled to an offer of coverage once they have been identified as such; part time employees are not owed an offer of coverage, but you may choose to cover them as a matter of policy.

If possible, it is best to make sure that employees that are no longer working have a terminated date entered in their file. Employers are (obviously) not required to provide coverage to employees that are no longer working for them. However, with agricultural employees, there are often gaps in employment. The HR system cannot tell whether an employee has been terminated, laid off or simply has a break in service if there is no termination date entered on the account.

The ACA Hour Eligibility Report groups employees according to their current status. Therefore, you will need to check different sections that each list full time employees to identify everyone that needs an offer of coverage.

Note that some employees that may have previously declined coverage may once again be eligible for coverage. This is because employees should receive at least one offer of coverage for each plan year. You will need to offer coverage to these employees and record the; covers on the employees' benefit records. The report will not automatically enroll these employees in coverage, unless you have instructed the software to do so.

The first time that you run the reports do not check the Update Hours/Status or Create/Update Benefit Records boxes. These options finalize the enrollment eligibility information, and this should not be done until you have made an offer of coverage to newly eligible employees. Note: If payroll has not been finalized for the month in question, select the Include hours form unprinted check in Batch or Daily Payroll. This will include the hours of the month in question even if the checks have not been printed.

If you do check the Create/Update Benefit Records box, you may need to manually edit or delete the records created by the report. Note: It is generally NOT recommended to run the report with this box checked more than once.

Ending Date: 05/31/2019
Eligibility Date: 06/01/2019
Category: All Employees
 Update Hours/Status
 Create/Update Benefit Records
 Print Employees With Zero Hours
 Require Pre-Enrollment Record for Newly Eligible Employees
Include Hours From: Unprinted Checks In Batch Daily Payroll
 Check for missing categories/monthly measurement records
 Print part time employees that declined in separate section
Buttons: Preview, Print Setup, Print, Cancel

Note: If payroll has not been finalized for the month in question, select the Include hours form unprinted check in Batch or Daily Payroll.

Run the ACA Hour Eligibility Report

Run the ACA Hour Eligibility Report again, with the Update Hours/Status, Create/Update Benefit Records boxes checked and Require Pre-Enrollment Record for Newly Eligible Employees. Note: If payroll has not been finalized for the month in question, select the Include hours form unprinted check in

Batch or Daily Payroll. Verify that the employees that are newly eligible are appearing in the correct section. Employees that declined coverage should now appear in the Declined section, and employees that opted for coverage should still appear in the Newly Eligible section. If an employee opted for coverage other than the default, their selected plan name will appear in the Description column. A different section will be created for those Full Time employees missing a Pre-Enrollment record. Due to their Full Time status an offer should be made and a response recorded. (?)

When using the monthly measurement period method, if a newly eligible employee is subject to a waiting period based on the Insurance Plan settings (for instance 60 days from date of hire), then the description column will include both the plan name and the starting enrollment date for coverage. If no date appears next to the plan name, this means that the employee has met any applicable waiting period and will be eligible and enrolled in coverage starting the day after the Ending Date for which you are running the ACA Hour Eligibility Report.

Running the report with the “Update Hours/Status”, “Create/Update Benefit Records” and “Require Pre-Enrollment Record for Newly Eligible Employees” boxes selected will create new enrollment records on the Health Benefits tab for employees that are newly enrolled and will extend the enrollment ending dates for employees that are still eligible for continued enrollment. If you are using the monthly measurement period, each employee that is enrolled in coverage has their ending date extended one month when you run this report with create/update benefit records box checked

Ending Date: 05/31/2019 ...
Eligibility Date: 06/01/2019 ...
Category: All Employees ...
 Update Hours/Status
 Create/Update Benefit Records
 Print Employees With Zero Hours
 Require Pre-Enrollment Record for Newly Eligible Employees
Include Hours From: Unprinted Checks In Batch Daily Payroll
 Check for missing categories/monthly measurement records
 Print part time employees that declined in separate section
Preview Print Setup Print Cancel

Note: If payroll has not been finalized for the month in question, select the Include hours form unprinted check in Batch or Daily Payroll.

Review information in the Benefit Eligibility Review screen

This window will list all health insurance and supplemental benefit records for all employees. You can apply various filters (located at the top of the window) to display entries that match only the criteria that you specify.

From this window you can edit the information on each benefit record, record employees that declined coverage, override the dates for coverage, create an enrollment file, and add a message to print on the eligible employees stubs.

The filter settings at the top of the window determine which entries from the benefits files appear in the grid. You can filter entries based on the starting and ending eligibility dates and for specific starting and ending coverage dates.

Empl #	Active	Last Name	First Name	Date Eligible	Date Offered	Start Date	End Date	Pre-Enroll	Insurance Co	Insurance Plan	Declined
3008	<input checked="" type="checkbox"/>	VASQUEZ LOPEZ	QUIRINO	4/1/2019	3/1/2019	4/1/2019	12/31/2019	<input type="checkbox"/>	ARIZON	Arizona Health Ins.	<input type="checkbox"/>
3009	<input checked="" type="checkbox"/>	ESPINOZA-RIVERA	EVA	1/1/2019				<input type="checkbox"/>	UABT	PB +	<input checked="" type="checkbox"/>
3012	<input checked="" type="checkbox"/>	RODRIGUEZ-ZARAGOZA	ALEJANDRA		3/1/2019			<input type="checkbox"/>			<input checked="" type="checkbox"/>
3013	<input checked="" type="checkbox"/>	GUZMAN-RAMIREZ	PAULINO		2/1/2019			<input type="checkbox"/>			<input checked="" type="checkbox"/>
3017	<input checked="" type="checkbox"/>	ORTIZ	JUAN ANTONIO	1/1/2015	12/12/2015	1/1/2015	12/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3017	<input checked="" type="checkbox"/>	ORTIZ	JUAN ANTONIO	10/1/2013		10/1/2013	10/31/2013	<input type="checkbox"/>			<input type="checkbox"/>
3021	<input checked="" type="checkbox"/>	GRASIDA	JAIIME ORTIZ	6/1/2016		6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3036	<input checked="" type="checkbox"/>	SANCHEZ	FABIAN RIVERA	6/1/2016	6/1/2016	6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3039	<input checked="" type="checkbox"/>	QUIROZ	MARIA CLARA	7/1/2016	6/16/2016			<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3053	<input checked="" type="checkbox"/>	REYES	LUCIANO REYES	6/1/2016		1/1/2016	12/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3055	<input checked="" type="checkbox"/>	MORALES	ULISES	10/1/2013		12/1/2018	1/31/2019	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3068	<input checked="" type="checkbox"/>	GARCIA	ROGELIO	10/1/2013		12/1/2018	1/31/2019	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3079	<input checked="" type="checkbox"/>	HERNANDES	JUAN MANUEL	10/1/2013		10/1/2013	11/30/2019	<input type="checkbox"/>			<input type="checkbox"/>
3079	<input checked="" type="checkbox"/>	HERNANDES	JUAN MANUEL	6/1/2016	6/1/2016			<input type="checkbox"/>	UABT	PB +	<input checked="" type="checkbox"/>
3079	<input checked="" type="checkbox"/>	HERNANDES	JUAN MANUEL	3/1/2018	3/1/2018	3/1/2018	10/31/2018	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3080	<input checked="" type="checkbox"/>	REYES MORALES	FRANCISCO		9/20/2013			<input type="checkbox"/>			<input type="checkbox"/>
3081	<input checked="" type="checkbox"/>	CANDIDO ROSENDO	JULIAN	10/1/2013		12/1/2018	1/31/2019	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3085	<input checked="" type="checkbox"/>	MENDOZA	PEDRO BASURTO	10/1/2013		10/1/2013	11/30/2019	<input type="checkbox"/>			<input type="checkbox"/>
3085	<input checked="" type="checkbox"/>	MENDOZA	PEDRO BASURTO	5/1/2015	4/15/2015	5/1/2015	12/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3095	<input checked="" type="checkbox"/>	SANTIAGO CHAVEZ	ALAN	6/1/2016		6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3098	<input checked="" type="checkbox"/>	FLORES	JUAN	6/1/2016	6/1/2016	6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3102	<input checked="" type="checkbox"/>	MENDEZ	FIDELA VELASCO	6/1/2016		6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3127	<input checked="" type="checkbox"/>	LOPEZ LOPEZ	FRANCISCA	6/1/2016	6/1/2016	6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3132	<input checked="" type="checkbox"/>	VENTURA	LUCIANA TENORIO	6/1/2016	6/1/2016	6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3134	<input checked="" type="checkbox"/>	VASQUEZ	RUTILIO ORTIZ	6/1/2016		6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>
3138	<input checked="" type="checkbox"/>	CISNEROS O	PATRICIA	6/1/2016	6/1/2016	6/1/2016	7/31/2016	<input type="checkbox"/>	UABT	PB +	<input type="checkbox"/>

Filters

Create Enrollment form From Benefit Eligibility Review screen

Click on this button 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 in a file to your insurance company.

Before creating the enrollment file, you should enter the ending coverage date for the enrollment you are creating, and select Accepted for the Status 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.

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.

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

The report printed from the **Benefit Eligibility Review** window can be customized to include both the date terminated and last check date to assist in this review.

Image 1

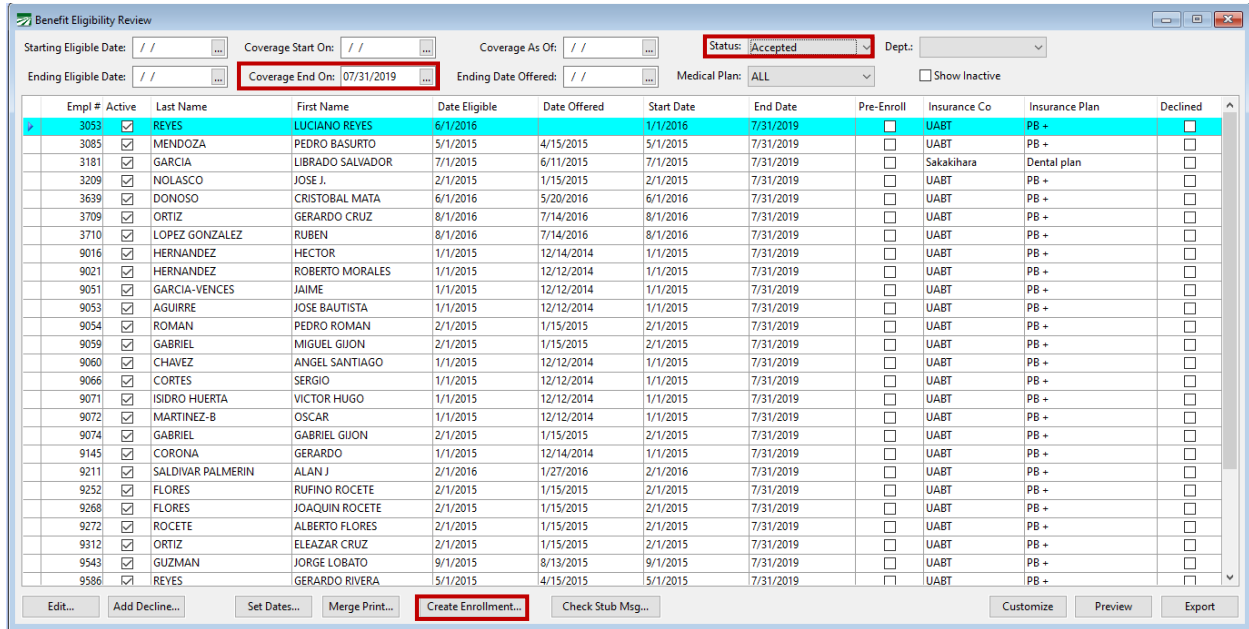
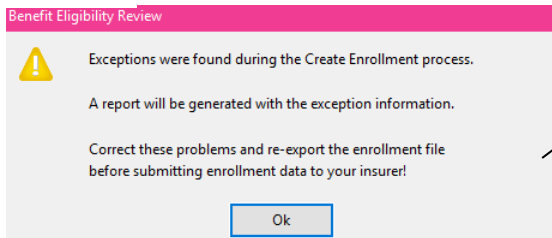


Image 2



This message will appear if there is any invalid information

Image 3

A Create Enrollment Exception Report will be generated with the information that needs to be verified.

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

Export Enrollment File

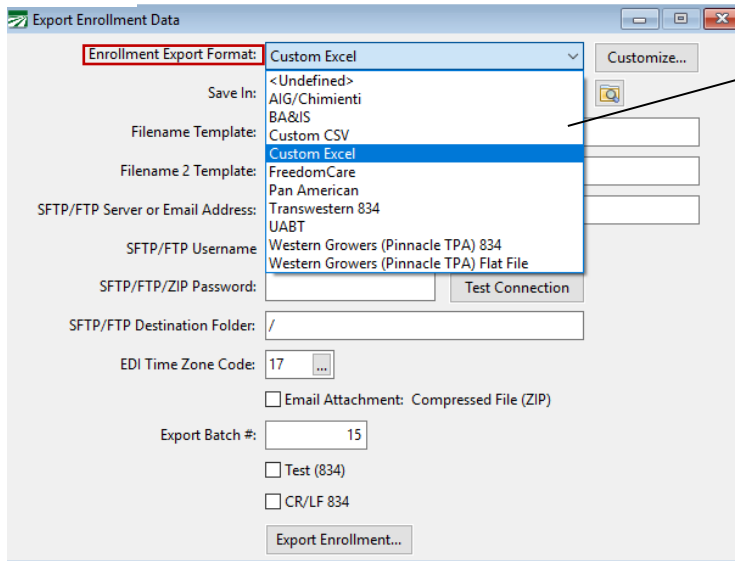
This option will export the enrollment data to a file that can be submitted to an insurer or TPA (Third Party Administrator). The enrollment file includes information on all the employees that are covered by a plan as well as the dependents (spouse and children) for employees that have opted for spouse,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

Select the format to use when exporting the report data. Each insurer or TPA will typically have a unique format (See image 1). Once this has been selected, the program will remember the format to use.

If you select the Custom Excel or Custom CSV format, you can modify the columns that are included in the export file and order in which they are output by clicking on the Customize button (See image 2).

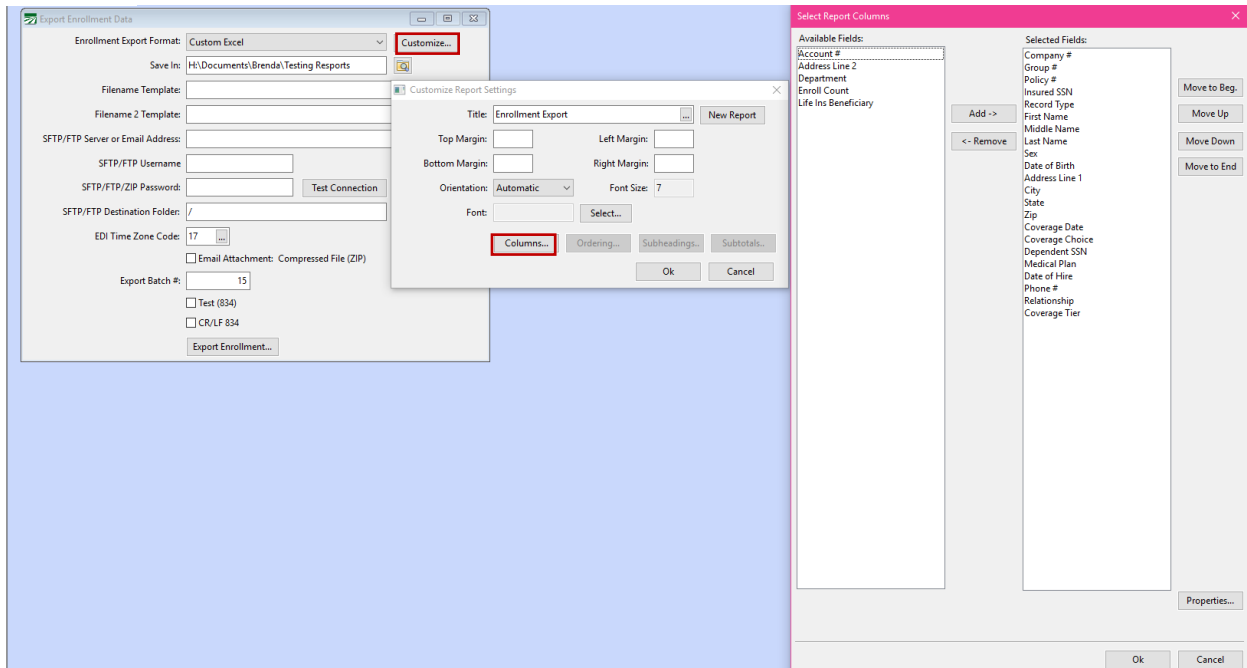
Once you have formatted the enrollment data as desired, click on the “Export Enrollment” button to export the enrollment data.

Image 1



Multiple format options

Image 2



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 the month you are terminating the employee. This will ensure the employee does not continue receiving coverage after he was 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 that the benefit record is deleted. (Need additional information)?