

# Updating Employee ACA Data

## Overview

The following steps will guide you through how to update employee information for ACA reporting.

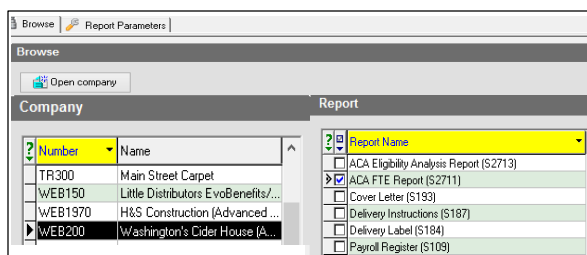
For questions regarding ACA policies and procedures consult the IRS website at [www.irs.gov](http://www.irs.gov)

## Step 1: Run the ACA FTE Report to determine if your company is an ALE (Applicable Large Employer).

NOTE: This report will show, based on payrolls selected, the number of Full Time and FTE employees in a selected period. ACA regulations state that an ALE is an employer with 50 or more Full Time and FTE employees.

### Follow the steps below to run the FTE Report:

1. Go to **Reports-Run Reports**
2. Click the **browse** tab and select your company if needed
3. Select the **ACA FTE Report (S2711)** and go to the Report Parameters tab.
  - a. If you do not have this report contact your service provider



4. Select the payrolls for which to run the report and update any parameters on the **Misc** tab as necessary, then click on Run Reports.
5. View the task queue to see the results.
6. If you are an ALE, proceed to Step 2.
  - a. If you are not an ALE, you may still need to complete the sections in Step 2 and Step 3. Please contact your Service Provider for more information.

## Step 2: Enter the Employees' ACA data

Go to the **Employee – Employee – ACA** tab and complete the following sections.

### 1. ACA Section:

- a. **ACA Status** - Select the appropriate status of the employee based on average hours worked.
- b. **ACA Benefit** – Select the name of the benefit that will be used to determine the lowest Cost Benefit for the employee
- c. **Lowest cost benefit** – This is the lowest cost tier offered to the employee, to be used on the form 1095-C line 8

- d. **ACA Policy Origin** - Select the appropriate option for this employee for use on the Form 1095-B - Line 8.
- e. **Safe Harbor type** – Select the appropriate option to be used when calculating affordability

### Effective Dating:

Effective dating allows you to ensure that any changes that happen within the year are selected correctly so that you can be sure to report accurate information. It is important that the effective dates of the fields listed below are correct:

- ACA Status
- Lowest cost benefit
- ACA Policy Origin
- Benefits eligible
- Safe Harbor Type
- ACA Format
- Form Type

Follow the steps below to confirm/update the effective dates of these fields:

1. Right click on the field
2. Click Effective Period

3. The Effective Period Editor will open
4. To add a new line, Click Create
5. Change the effective date and value if needed.

6. Click OK

## Copy To:

You may also copy the selection and effective date to multiple employees. The fields listed below allow you to copy the field selection and effective date to several employees at one time.

- ACA Status
- Lowest Cost Benefit
- ACA Policy Origin
- Benefits Eligible
- ACA Format
- Form Type
- ACA Coverage Offer

Follow the steps below to copy information to one or multiple employees:

1. Right click on the field from which you will copy information.
2. Click **Copy to...**

3. Select the Employee(s)
  - a. To select multiple employees at one time, hold the Shift key down on your keyboard and select the employees with your mouse.
4. Update the **Begin Effective Date** to the date that should be used for these employees.
5. Click **Copy to all** or **Copy**
  - a. Click **Copy to all** to copy that field and effective date to all employees
  - b. Click **Copy** to copy the field to only the selected employee(s)

EE Code	Last Name	First Name	Hire Date
2	MacIntosh	Peter	8/27/2013
3	Golden	Allyson	5/27/2013
4	Gala	Eugene	11/24/2013
5	Cortland	Pauline	8/10/2014
6	Fuji	Frank	1/26/2014

Begin Effective Date: 1/1/2016

Buttons: Copy to all, Copy, Cancel

## 2. Reporting Section:

- a. **Form on File** – Select **Yes** if you have written permission to release the employee's 1095 form electronically.
- b. **ACA Format** – Select the format by which the employee will receive their 1095 form.
  - i. **None** – the Employee will not receive a 1095
  - ii. **Both** – the Employee will receive both an electronic and paper copy
  - iii. **Paper** – The Employee will only receive a paper copy
- c. **Form type** – Select if the employee will receive a 1095B or 1095C

## 3. History Section:

To update the ACA Coverage and Applicable Section 4980H for the employee, follow the steps below.

- a. Select the **year** for which you will be adding/updating and click on the **ACA History** button.
- b. In the **ACA History** table, select the **ACA Coverage** and **Applicable Section 4980H** code for each month where a change should be made and click on **Save**.
  - i. Select for only the months where a change happened. Evolution will carry the change through to the end of the year, or until another change is made.
  - ii. If no changes are needed, simply click on **Save**.

Month	ACA Coverage	Applicable Section 4980H
January	1A-Qualifying Offer	
February		
March		
April		
May		
June		
July		
August		
September	1D-MEC for EE and Spouse Only	2C-Employee Enrolled in Coverage
October		
November	1F-MEC, No Minimum Value Offered	
December		

Buttons: Save, Cancel

## Step 3: Health Coverage Dependents

For reporting purposes, Employees on Self-Funded plans must have dependents reported on their 1095 forms. The Dependents may already be listed and updated correctly. Follow the steps below to review, add, or update any dependent information.

- Go to the **HR Module-Employee-Benefits-Details** tab and confirm that the benefit is available.
  - If the benefit is not listed, please contact your Service Provider.
- Go to the **Dependents & Beneficiaries Tab**.
- Click **Create** to add the dependent if it is not already listed.

- In **Person Type**, select **Dependent**, then enter the dependent information and then **Save**.
  - If the dependent has the same address as the employee, click **Copy EE Address** to save you time.
- Once all dependents have been entered, go to the **Assign Dependents** tab.

### Assign Dependents

To add a dependent to a benefit:

- Select the benefit from the **Benefit Summary** section using your mouse.
- Next, select the dependent(s) from the list of **Available Dependents**.
- Click **Add**.

- The dependent will then be moved to the **Assigned Dependents** Section.

NOTE: After adding the dependent, you must post and commit in order to activate the ability to add a begin and end date in the Plan Dates Grid:

- Click **Create** in the **Plan Dates** section
- Select the appropriate Begin date from the drop down

- Save and Commit the changes.

NOTE: The Begin date for which the Dependent is receiving coverage must be updated if it is different from the Employee's coverage date. If this date is left blank, Evolution will assume the dependent received coverage for the same time period as the employee. To update the Begin and End dates