



ACA 2021 Preparation Guide



Release 12.0.20

2021 ACA

As we approach the end of 2021, it is a good time to begin thinking about ACA and to start planning your 2021 ACA filing. This is especially true if you have not been making updates and changes in the system throughout the year.

The key to ACA success is to simply maintain accurate and up-to-date records in the isolved system. To assist with this, we have developed this guide to help walk you through the fields that need to be maintained and updated throughout the year to ensure accurate 1094-C and 1095-C forms are produced. By following this guide, your forms should only require a quick review and approval at year end!

There are various types of isolved users. Some of you process payroll on another platform and only use isolved to produce 1095 forms. This guide is mostly designed for you and will help you make updates that may not be happening throughout the year. Then there are users who process payroll with the isolved platform but don't utilize a full benefit module. This guide will also be helpful for you. Lastly, those clients who use isolved and fully utilize the benefits module allowing employee benefit elections to drive the actual payroll deduction. These users should have everything up to date as each payroll is produced throughout the year. If that is you, skip to page 27 of this guide where you will be prompted to preview and approve your forms.

Please feel free to contact our support team with any questions at ACASupport.HCM@ncr.com.

Thank you,

NCR ACA Team



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Basic navigation

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Employment Category	EE Management >> EE Maintenance >> Employment
Employee Benefit Enrollment	EE Management >> Employee Benefits >> Benefit Plans
Adding Dependents (Required for self-funded plans)	EE Management >> Human Resources >> Employee Contacts
Employee 1095 Overrides	EE Management >> Employee Benefits >> ACA Report Overrides
Reprint 1095-C form PDF	Employee Self Service >> W2/ACA/1099 Forms
Medical Plans (Company)	Client Management >> Benefits >> Benefit Plans
Medical Plan(s): New Hire/Term Rules	Client Management >> Benefits >> Benefits Plans >> Dates Tab
Medical Plan(s): ACA Minimum Essential Coverage, Minimum Value, Self- Funded	Client Management >> Benefits >> Benefits Plans >> Plans Tab
Medical Plan(s): Eligibility Rules	Client Management >> Benefits >> Benefits Plans >> Options Tab
Medical Plan(s): Rates	Client Management >> Benefits >> Benefits Plans >> Rates Tab
Setup a reporting group	Client Management >> ACA Setup Options >> ACA Reporting Groups
Setup filing year	Client Management >> ACA Setup Options >> ACA Report Options
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Adding non-employees (self-funded plans only)	Client Management >> ACA Setup Options >> Non-Employee Overrides
Preview/Approve forms	Client Management >> ACA Setup Options >> ACA Forms Approval
Import EE overrides	Client Management >> ACA Setup Options >> Import ACA EE Overrides
My Reports Queue	Client Management >> Reporting >> My Reports Queue

ACA Success

Maintaining accurate employee records in isolved

The 4 major driving forces:

It is imperative that the four fields listed below are maintained throughout the year. This will ensure that the codes produced on the ACA 1095-C forms are correct. If the employee records are not properly maintained, your 1095-C forms may have inaccurate information reported.

1. Employment status history

Each employee must have an accurate history of employment status with accurate effective dates in isolved. This includes accurate hire dates and, if applicable, inactive, termination & rehire dates, etc. isolved will use this data to determine the correct codes to populate on Line 14 (Offer of Coverage) and Line 16 (Safe Harbor) of the 1095-C Form for each month of the calendar year.

2. Employment category history

Each employee must have an accurate employment category history with correct effective dates in isolved. isolved will use this data to determine the correct code to populate on Line 14 of the 1095C-Form for each month of the calendar year.

3. Medical plan history

Each employee and their dependents that are enrolled in a medical plan must have a benefit plan assigned to the employee's record in isolved ay with correct effective dates. isolved will not recognize the scheduled medical deduction, it is programmed to recognize the assignment of the benefit plan to the employee. If the plan is not assigned to the employee, the 1095-C form will not reflect their enrollment.

4. Medical plans and rates

Medical plans need to have current rates for Line 15 (Employee required Contribution) to populate accurately.

The image shows a portion of the 1095-C form. It includes sections for:

- Part I Employee:** Fields for name, SSN, date of birth, street address, city, state, and ZIP code.
- Part II Applicable Large Employer Member (Employer):** Fields for name, street address, city, state, and ZIP code.
- Part III Employee Offer of Coverage:** A table with columns for Plan Start Month (Jan-Oct) and rows for Offer of Coverage, Employee Required Contribution, and Section 504(a) Safe Harbor.
- Part IV Covered Individuals:** A table for listing covered individuals with columns for SSN, date of birth, and months of coverage (Jan-Sep).



Adding Eligibility Rules (Active Full Time)

Client Management >> Benefits >> Eligibility Rules

Click on **Add New** in the black action bar

Populate the **Rule Name** and **Description**

In the **Types** column click **Benefits** to move over to selected options column

Click **Next** in the black action bar

Eligibility Rules

→ Next
↶ Cancel

Eligibility Rule

*Rule Name:

Description:

Types

Available Options	Selected Options
<ul style="list-style-type: none"> Select All Values > Absence Policies > Accrual Plans > Employee Messages > Mass Email > Timecard Policy Groups > Workflow > 	<ul style="list-style-type: none"> Deselect All Values x Benefits x

Click on [blue](#) hyperlink to **Add Filter**

Select a Field category: **Employee Data**

Field: **Employment Status** from drop down menu

Operator: **In**

Filter Value: select **Active** then click on arrow to bring over to box on right.

Click Done

Click on [blue](#) hyperlink to **Add Filter**

Select a Field category: **Employee Data**

Field: **Employment Category** from drop down menu

Operator: **In**

Filter Value: select **Full Time** then click on arrow to bring over to box on right.

Click Done

Click **Save** in the black action bar

Adding Eligibility Rules (ACA Variable Hrs. met for ACA FT Status)

Click on [blue](#) hyperlink to **Add Filter**

Select a Field category: **Employee Data**

Field: **Employment Status** for drop down menu

Operator: **In**

Filter Value: select **Active** then click on arrow to bring over to box on right.

Click **Done**

Click on [blue](#) hyperlink to **Add Filter**

Select a Field category: **Employee Data**

Select a Field: **ACA Variable hours met for ACA Full Time Status**

Operator: **In**

Filter Value: select **True** then click on arrow to bring over to box on right.

Click **Done**

Click **Save** in the black action bar

Eligibility Rules

Rule Name: Full Time

AND

*Field Category: Employee Data

*Field: Employment Status

*Operator: In

*Filter Value: A - Active

Employee Data

ACA Variable hours met f...

In

Select All Values

Select Filtered Values

False

Deselect All Values

Deselect Filtered Values

True

Done Cancel

Add Filter

***If you have detailed eligibly rules, please feel free to reach out to ACAsupport.HCM@ncr.com ***



Building New Plans

Only build new plans if:

- You changed from Self-Funded to Fully Funded (or vice versa)
- Your New Hire Probationary Period has changed
- The eligibility rules have changed
- You switched or added new insurance carriers

*** If the rates are the only change, no new plan is needed. See section on adding new rates ***

If you need assistance in setting up new plans, please email ACAsupport.HCM@ncr.com.

Client Management >> Benefits >> Benefit Plans

Click **Add New** in the black action bar.

Benefit Type: **Medical** (may vary)

Plan Name: **HMO/PPO/HSA** (plan names may vary)

Plan Description/Provider/Plan ID/Group ID/Integration Code (these are all non-required fields)

If Applicable, Check boxes for:

Self-Insured / Conditional of Coverage for Spouse / ACA Minimum Essential Coverage / ACA Minimum Value
(Other boxes will not affect ACA)

Benefit Plans

→ Next
↶ Cancel

Benefit Type

*Benefit Type:

*Plan Name:

Plan Description:

Provider:

Plan Id:

Group Id:

Integration Code:

COBRA Eligible

Creditable Coverage

Includes Rx Coverage

Self Funded Plan

Conditional Offer of Coverage for Spouse

ACA Minimum Essential Coverage

ACA Minimum Value

Proof of Insurability Required



Building New Plans (Continued)

Effective Dates

Start Date: MM/DD/YYYY

Stop Date: MM/DD/YYYY

The start date should reflect the plan start date. The Stop date should be dated for 2099. This allows for annual renewals. Can be edited if plan is discontinued in future.

New Hire Probation Period/Termination Rule/Loss of Eligibility Rule

These are all fields that are based on your company polices.

Click **Next** on the black action bar.

Pay Items

Pay items are only used if your plans are linked to your payroll deductions. If you are unsure, please reach out to your CSR.

Click **Next** in the black action bar.

Enrollment Options

This does not affect ACA. Click **Next** in the black action bar.

Age Out Options

Dependent Child: 26

Full Time Student: 26

Age as of: Age as of 1st of Month After Birthday

Your company policy may vary from the example above.

Benefit Type Rules (This is not recommended)

Benefit Plan Rules

In this section use the double arrows (>>) to move the applicable eligibility rules to included eligibility rules box.

Click **Next** in the black action bar.

Benefit Plans Isolved University

Status: Active Benefit Type: All As of Date: 10/6/2021 Filter

Plan Name	Benefit	Provider	Plan Id	Start Date	Stop Date	Sort Order
HMO - Mgmt	Medical Pre-Tax 125			11/01/2015	10/31/2099	0
HMO - Non Mgmt	Medical Pre-Tax 125			11/01/2015	10/31/2099	0
PPD - Mgmt	Medical Pre-Tax 125			01/01/2021	12/31/2021	0
PPD Non Mgmt	Medical Pre-Tax 125			01/01/2016	12/31/2099	0

Plans Dates Pay Items **Options** Life Events Dependencies Rates Messages

Edit Refresh Save Cancel

Enrollment Options

Display Order: 0

Auto Enroll All Employees

PCP Required

PCP Allowed Not Required

Validate Min/Max Dependents

Age Out Options

Dependent Child: 26

FT Student: 26

Age as of: Age as of 1st of Month After Birthday

Benefit Type Rules

There are no eligibility rules assigned to the 'Medical Pre-Tax 125' benefit type making the employee automatically eligible for the benefit type. Additional rules may be selected below. Employees must meet at least one rule in order to be eligible for this benefit plan.

Benefit Plan Rules

Eligibility Rules:

FT
FT-Mgmt

Included Eligibility Rules:

FT-Non Mgmt
ACA Variable Hrs met for ACA FT

Report Export

Eligible Employees

Select an option below to generate a list of employees who are eligible for the plan based on the eligibility rules assigned to the benefit type and those attached to the plan.

Report Export

To view the Eligibility Report

Go to the **Options** tab and click on the **Report** (PDF) or **Export** (Excel) button.

Note: Eligibility may vary by plan.



Building New Plans (Continued)

Life Event Probation Rule

This does not affect ACA. Click **Next** in the black action bar

Plan Dependencies

No Dependencies radio button is selected by default. Click **Next** in the black action bar

Rate Effective Dates

These dates should prepopulate based on plan effective date

Coverage Code Selection

In this section use the double arrows (>>) to move the applicable coverage codes over to the Selected Coverage Code box. This will stack coverage code grid below. Please take the opportunity to populate the plan rates in the respective columns. Note: Only lowest cost of employee only coverage will affect 1095-C forms. Employee Monthly Value for EE is required for ACA all others are optional. Unless your plans utilize Pay Items.


Click **Save** in the black action bar.


Benefit Plans

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← Previous Save → Cancel

Rate Effective Dates

Start Date * 

Stop Date * 

Coverage Code Selection(s)

Available Coverage Code(s):

>>
<<

Selected Coverage Code(s):

EE

EE+1

EE+CHILDREN

FAMILY

Benefit Coverage	Monthly Premium	Employee Allocation %	Employer Allocation %	Employee Monthly Value	Employer Monthly Value	Non-Tobacco Use Credit	Wellness - Other Credit	Cost Bands
EE	560.00	28.571429	71.428571	160.00	400.00			Click to view EE cost bands
EE+1								Click to view EE cost bands Click to view Dep cost bands
EE+CHILDREN								Click to view EE cost bands Click to view Dep cost bands
FAMILY								Click to view EE cost bands Click to view Dep cost bands

If your plans utilize cost bands, please reach out to ACAsupport.HCM@ncr.com for further guidance



Updating Benefit Rates

Build rate tiers for new plan year roll-over

Client Management >> Benefits >> Benefit Plans

Highlight the medical benefit plan that requires an update to reflect renewal rates.

Click on the Rates tab (just above the black action bar)

Benefit Plans

Status: Active Benefit Type: All As of Date: 10/1/2021 Filter

Plan Name	Benefit	Provider	Plan Id	Start Date	Stop Date	Sort Order
HSA	Health Savings Account			01/01/2017		0
HMO - Mgmt	Medical Pre-Tax 125			11/01/2015	10/31/2099	0
HMO - Non Mgmt	Medical Pre-Tax 125			11/01/2015	10/31/2099	0
PPO - Mgmt	Medical Pre-Tax 125			01/01/2021	12/31/2021	0
PPO Non Mgmt	Medical Pre-Tax 125			01/01/2016	12/31/2099	0
Greater than 50k	Vol EE Life Greater than \$50k			01/01/2017	12/31/2099	0

Plans Dates Pay Items Options Life Events Dependencies **Rates** Messages

Refresh Save Cancel

Click on arrow for the drop-down bar to change the Rate Year.

Select <Add New>

Click on radio button to Copy Prior Rates

Rate Effective Dates

Start Date: Should default to the first day of renewal.

Stop Date: Should be the date the new rates expire.

In this section you will see the benefit coverage tiers from the prior plan year with the expired rates. Please take the opportunity to replace the expired rates with the renewal rates in the respective columns.

Note: EE is the only monthly value in the grid that will affect the ACA forms.

Click Save in the black action bar.

Refresh Save Cancel

Rate Year: <Add New>

Copy Prior Rates Add New Rates

Rate Effective Dates

*Start Date: 11/1/2021 *Stop Date:

Benefit Coverage	Monthly Premium	Employee Allocation %	Employer Allocation %	Employee Monthly Value	Employer Monthly Value	Non-Tobacco Use Credit	Wellness - Other Credit	Cost Bands
EE	654.95	59.630500	40.369500	390.35	264.40	40		Click to view EE cost bands
EE+1	150.00	100.00	0.00	150.00	0.00			Click to view EE cost bands
EE+CHILDREN								Click to view EE cost bands
FAMILY								Click to view EE cost bands

If your plans utilize cost bands, please reach out to ACAsupport.HCM@ncr.com for further guidance



Add Employee Contacts/Dependents

Employee Management >> Human Resources >> Employee Contacts

Select employee and click on **Add New** in the black action bar

Relationship: Select from the drop down

Check off the box for Dependent

Populate all required fields

Add DOB & SSN

Click **Save** in the black action bar

Employee Contacts

↕ Contact Person ↕ Relationship Code ↕ Emergency Contact ↕ Dependent ↕ Beneficiary ↕ Home

+ Add New ✎ Edit 🗑 Delete 🔄 Refresh 💾 Save ↩ Cancel

Contact Type

*Relationship:

Emergency Contact

Dependent

Beneficiary

Other Information

Hide Contact in ESS ⓘ

Deceased

Dependent Information

Full-time Student

Disabled

General Information

*First Name:

Middle Name:

*Last Name:

Prefix:

Suffix:

Personal

Update SSN:

*Update Birth Date: ⓘ

Gender:

Contact Information

Call Order: ⓘ

Home:

Mobile:

Office:

Email Address:

Address

Use Employee Address

Street:

Zip Code:

Hit Enter Key in zip code field to retrieve city list.

City:

State:



Employee Benefit Enrollment

Employee Management >> Employee Benefits >> Benefit Plans

Select an employee record

Click on **Add New** in the black action bar

Select **Benefit Type** from the drop down

Select **Plan** from the drop down

Start date should be the first day the employee had coverage

Select **Coverage Type** from the drop down

Enter a Stop date only if the employee ended coverage

Enter Plan Enrollment date (should match Start Date)

Click on **Save**

Repeat for next employee enrollment

Note: Check off the named dependents in the lower section if you select a coverage type that allows dependents. Only available dependents will show. See adding Contacts / Dependents.

Benefit Plans

isolated University

Status: Active

Start Date	Benefit	Benefit Plan	Override Plan Limit

+ Add New
Edit
Delete
Refresh
Save
Cancel

Benefit Plan

*Benefit Type: Medical Pre-Tax 125

*Plan: PPO Non Mgmt

*Start Date: 9/1/2021

*Coverage: FAMILY

Per Pay Amount: 0.00

Stop Date:

Benefit End Reason:

Plan Stop Date: 12/31/2099

Enrollment Submission Date: 10/4/2021

Plan Enrollment Date: 9/1/2021

Eligibility Date:

Participant Id:

Employee Notes

Notes:

Dependents

Name	Include	Start Date	Stop Date	Benefit End Reason
Jenn Trent	<input checked="" type="checkbox"/>	9/1/2021		
Emily Trent	<input checked="" type="checkbox"/>	9/1/2021		
Armando Trent	<input checked="" type="checkbox"/>	9/1/2021		

Note: If there are no medical plans listed in the drop-down menu for medical type it could be one of the following.

- Employee is not eligible / Check employee category
- Medical plans do not have current rate tiers / add new rate



Edit Employee Benefit Enrollment

Employee Management >> Employee Benefits >> Benefit Plans

Select an employee record

Select the coverage (change status to All to see historical plans)

Click on **Edit** in the black action bar

Enter a Stop date only if the employee ended coverage

Enter Plan Enrollment date (should match Start Date)

Click on **Save**

Benefit Plans

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Status:

Start	Benefit	Benefit Plan	Override Plan Limit
1/1/20	Medical Pre-Tax 125	PPO Non Mgmt	

+ Add New **Edit** Delete Refresh Save Cancel

Benefit Plan

Employee Notes

*Plan:

*Start Date:

*Coverage:

Per Pay Amount: **87.69**

Stop Date:

Benefit End Reason:

Plan Stop Date: **12/31/2099**

Enrollment Submission Date:

Plan Enrollment Date:

Eligibility Date:

Participant Id:

Notes:



ACA Report Overrides

Employee Management >> Employee Benefits >> ACA Report Overrides

Select an employee record

Click on **Add New** in the black action bar

Change the year to **2021**

Select your overrides using the drop down for only the months that need overrides

Click **Save** in the black action bar

ACA Report Overrides

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Year
+ Add New
Edit
Delete
Refresh
Save
Cancel

ACA Reporting Year
 *ACA Reporting Year: Plan Start Month:

Code Series 1: Offer of Coverage
 Line 14: Code used to specify the type of coverage, if any, offered to an employee, the employee's spouse, and the employee's dependents.

ALL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Employee Required Contribution
 Line 15: Amount of the employee required contribution, which may vary by month, the employee share of the monthly cost of the lowest-cost, self-only minimum essential coverage providing minimum value offered to the employee.

ALL	JAN	FEB	MAR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Code Series 2: Section 4980H Safe Harbor and Other
 Line 16: Code used to specify why the employer should not be required to offer minimum essential coverage to an employee, when applicable.

ALL	JAN	FEB	MAR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

ZIP Code
 Line 17: ZIP code used for identifying the lowest cost silver plan for an employee who is not eligible for a Health Reimbursement Arrangement (HRA). Calculate the Employee Required Contribution for Line 15 for employers who offered the employee an individual coverage.

ALL	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



ACA Reporting Groups

Reporting Groups are only to be used by customers that have multiple FEINs under their company umbrella that will report as an Aggregate Group. If they do not have an Aggregate Group, do not add anything here.

Client Management >> ACA Setup Options >> ACA Reporting Groups

Click on the **Add New** in the black action bar. (If there is not a group)

Click on the **Edit** in the black action bar. (To make changes to a group)

Group Type: Select the appropriate option:

“Aggregate ALE Group,” which is most common, is used for a group of entities that are under common control (for example: parent and subsidiary).

“Designated Governmental Entity (DGE)” can be used for a government entity that is appropriately designated to file for another governmental unit.

Group Name: Key in the name for the Aggregate Group you are setting up. You can have more than one Group Name with selected entities in each.

Group Members: A list of related companies that are set up in the isolved system will display in the Available Legal Companies box. Select and move those companies that make up the Group that you are working on setting up to the Selected Legal Companies box.

Additional Group Members: Used to add in the Legal Name and FEIN for companies that are included in the Aggregate but are not set up in the isolved system.

Click on **Add New** and key in the **Legal Name** and **FEIN**.

Click **Save** in the black action bar

ACA Reporting Groups

Group Type	Group Name
Aggregate ALE Group	ACA

Use this screen to setup Aggregate ALE (Applicable Large Employer) Groups and Designated Governmental Entities (DGE). Select a Group Type. If 'Designated Governmental Entity (DGE)' is selected, additional fields will be displayed.

ACA Group Type
*Group Type:

ACA Report Groups
*Group Name:

Additional Group Members
Legal Name: FEIN:

Group Members
Select the members of this group. A legal company can only be a member of one ACA Reporting Group.

Available Legal Companies:

Selected Legal Companies:
Demo Network Company, Inc
Lewis Family Restaurant, Inc



ACA Report Options

Client Management >> ACA Setup Options >> ACA Reporting Groups

Click on the **Add New** in the black action bar

ACA Reporting Year: Add in the year (2021)

ACA Company Contact: Select the correct contact person from the drop-down menu. If the correct contact is not listed, please follow these steps.

Client Management>>Client Maintenance>>Contacts

Click **Add New** in the black action bar

Update First Name/Last Name/Email Address/Auth Code (1234) and Phone number

Click **Save** in the black action bar

ACA Reporting Group: This is used in connection with the ACA Reporting Groups and is only added if there is an aggregate group set up in the ACA Reporting Groups section. Select the month(s) or "All Months" to represent the months that this legal is part of the aggregate group

ACA Report Options

Report Options Employer Overrides

Year

- 2016
- 2017
- 2018
- 2019
- 2020

Report Options + Add New Edit Delete Refresh Save Cancel

ACA Reporting Year

*ACA Reporting Year: Format: YYYY

ACA Company Contact

The name and phone number for the selected Contact will be used on reports for this Company. If no Contact is selected, the information for the W3 Contact will be used.

Contact:

ACA Reporting Form

1094/1095-B Forms

The 1094-B and 1095-B forms are filed by self-insured employers who are not considered "Applicable Large Employers."

1094/1095-C Forms

The 1094-C and 1095-C forms are filed by "Applicable Large Employers" whether self-insured or fully-insured.

ACA Certifications of Eligibility

Qualifying Offer Method

Form 1094-C Line 22: Option 'A' will be selected.

98% Offer Method

Form 1094-C Line 22: Option 'D' will be selected.

ACA Reporting Group

Form 1094-C Part III Lines 23-35, Column (d) will be populated based on the selections made below.

If a reporting group is listed below then either All Months or at least one individual month must be selected.

Reporting Group: ACA

- All Months
- JAN
- FEB
- MAR
- APR
- MAY
- JUN
- JUL
- AUG
- SEP
- OCT
- NOV
- DEC

Note: Skip this section if you are a single FEIN unrelated to any other FEIN. Since you can not be a group of 1 - you are not part of an ALE Reporting Group.

Employee Count Method

Employee Count Based On:

Default: Last Day of Month



ACA Non-Employee Overrides

The ACA non-employee override section should be used for Cobra participants or Retirees only when a **self-funded** plan is offered. Anyone who elected self-funded coverage for any month of 2021 while not actually an employee for that month. Follow these instructions:

Client Management >> ACA Setup Options >> ACA Non-Employee Overrides

If the non-employee's name is not listed at the top left side of the screen, used **Add New** function.

Click on **Add New** in the black action bar,

Enter the **First name, Last name, Address, SSN & DOB** for Cobra / non-employee

Change year at bottom of page to 2021 if it does not automatically populate.

Code 1G will populate by default but may be changed to a 1S if applicable.

Check off all months of 2021 that non-employee was enrolled in coverage

Click **Save** in black action bar

After saving the non-employee override, a second tab will appear for their **Dependents**

Enter the **First name, Last name, SSN & DOB** for non-employee Dependent

Change year at bottom of page to 2021

Check off all months of 2021 that non-employee dependent was enrolled in coverage

Click **Save** in black action bar

Repeat for all dependents

ACA Non-Employee Overrides

Isolved

Non-employee Overrides

+ Add New | Edit | Delete | Refresh | Save | Cancel

Non-Employee Information

*First Name: Jack
*Last Name: Trent

Address

*Address1: 101 Happy Street
Address2:
*City: Beautiful View
*Zip Code: 07823
*State: New Jersey

Personal Information

SSN:
Update SSN: 987-65-4321
Birth Date:
Update Birth Date:

Coverage Information

YEAR	CODE		ALL											
	SERIES 1	MONTHS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2021	1G	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add New

ACA Non-Employee Overrides

Isolved University

Non-employee Overrides | Dependents

+ Add New | Edit | Delete | Refresh | Save | Cancel

Dependent Information

*First Name: Jen
*Last Name: Trent

Personal Information

SSN:
Update SSN: 876-54-3219
Birth Date:
Update Birth Date:

Coverage Information

ALL			JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
YEAR	MONTHS		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2021											



ACA Non-Employee Overrides (Continued)

- If the non-employee's name is listed at the top left side of the screen, use the edit function to add the new year of coverage.
 - Click on **Edit** in the black action bar
 - Click **Add New** button below the prior year listed
 - Change year to 2021 if it does not automatically populate
 - Code 1G will populate by default but may be changed to a 1S if applicable
 - Check off all months of 2021 that non-employee was enrolled in coverage
 - Click **Save** in black action bar
 - After saving the non-employee override for new year, click on **Dependents** tab to update their dependents
 - Click **Edit** in the black action bar
 - Check off all months of 2021 that non-employee dependent was enrolled in coverage
 - Click **Save** in the black action bar
 - Repeat for all dependents
- Repeat for next Cobra / non-employee override

ACA Non-Employee Overrides

Isolved University

Non-employee Overrides | Dependents

+ Add New **Edit** Delete Refresh Save Cancel

Non-Employee Information

*First Name: Jack
*Last Name: Trent

Address

*Address1: 101 Happy Stree
Address2:
*City: Sunshine
*Zip Code: 07823
*State: New Jersey

Personal Information

SSN: 987-65-4321
Update SSN:
Birth Date:
Update Birth Date:

Coverage Information

YEAR	CODE	ALL	MONTHS	MONTHS													
				JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		
2020	1G	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2021	1G	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add New



ACA Forms Approval

To Review forms:

Client Management >> ACA Setup Options >> ACA Forms Approval

Click on the **Preview Report**

Go to **Reporting >> My Reports Queue**

Click on the [blue](#) hyperlink in the View Report Column

If the hyperlink is not available, Click on Refresh in the black action bar until the hyperlink appears.

This report is designed to highlight anything the IRS may flag as an issue. Fix any errors highlighted on report. Once you re-run the report you should have zero potential errors and zero critical errors.

Next, Click on **Preview Forms** button.

Review the forms for accuracy.

Go to **Reporting >> My Reports Queue**

Click on the [blue](#) hyperlink in the View Report Column

Last step: Click on the **Approve Forms** button once you are done with the review of all forms.

Repeat steps for each company you have on system

ACA Forms Approval

Approve
History

Year


*Year:

Report Type

Report Type for Selected Year: **ACA 1094-C and 1095-C Employer**

Preview Report


Preview Report produces a condensed version of the form 1094 and 1095 data and highlights issues that should be addressed prior to approving forms.

[Preview Report](#) 

The results for the preview report are located in My Reports Queue.

Preview Forms

Preview Forms produces a full version of the form 1094 and 1095 data.

[Preview Forms](#) 

Approve Forms 1094/1095

Once you select Approve Forms, the system will commit the forms to the Year End Batch Print for Service Bureau printing and filing.

[Approve Forms](#)

Last Approved

ACA Measurement Policies

Client Management >> ACA Setup Options >> ACA Measurement Policies

Click on the **Add New** in the black action bar

Policy Group: Used to name the group that this policy applies to, you could have one or more than one depending on your needs

Use Monthly Measurement Period: Check this box if you will measure monthly.

Priority: Use this to establish the priority order if using more than one policy.

Rehire Option: Used to define the Rule of Parity needed for this company. This is the rule that determines how a rehire, including their previous work longevity, is treated as a new hire or not. Select the appropriate option from:

***If you need assistance setting up measurement policies, please contact ACAsuport.HCM@NCR.com ***

ACA Measurement Policies

Policy Group	Monthly Measurement Period
ACA	

Policies Eligibility Ongoing Measurement Periods

+ Add New Edit Delete Refresh Save Cancel

Identification

*Policy Group:

Use Monthly Measurement Period

Priority:

Rehire Option:

Initial Measurement Period

*Start On:

*Following: days of service

*Duration (months):

Initial Stability Period

*Start On:

*Following: days after IMP end date

ACA Measurement Policies

Policy Group	Monthly Measurement Period	Priority
ACA		0

Policies Eligibility **Ongoing Measurement Periods**

+ Add New Edit Delete Refresh Save Cancel

SMP Start	SMP Stop	SAP Start	SAP Stop	SSP Start	SSP Stop
01/01/2019	12/31/2019	01/01/2020	02/29/2020	03/01/2020	02/28/2021
01/01/2020	12/31/2020	01/01/2021	02/28/2021	03/01/2021	02/28/2022
01/01/2021	12/31/2021	01/01/2022	02/28/2022	03/01/2022	02/28/2023

Standard Measurement Period

*Start Date:

Standard Administrative Period

*Start Date:

Standard Stability Period

*Start Date:

*Stop Date:



DEFINITIONS:

Initial Measurement Period. This is the duration of time between 3 and 12 months (chosen by the employer) that will be used for determining if new Variable Hour Employees (defined below) or Seasonal Employees (defined below) are considered full-time employees. The Initial Measurement Period may begin on the date of hire or the first day of the calendar month following the date of hire. The total initial period (Measurement plus Administrative Periods) may not exceed 13 months, plus the remainder of the calendar month. The employer must re-test the employee when that employee completes the standard measurement period for ongoing employees.

Administrative Period. This is the period between the end of the Standard Measurement Period (or of the Initial Measurement Period) and the associated Stability Period. The Administrative Period may last up to 90 days (subject to certain limitations) and is envisioned to be the time during which employers determine which of its employees have satisfied the requisite 30 hours per week average in order to be eligible for coverage. This is also the period in which eligible employees are provided with information about medical plan coverage options and given an opportunity to enroll.

Stability Period. This is the period of time between 6 and 12 months (chosen by the employer subject to certain limitations) during which an employee's status as a full-time employee (or not) is fixed based on the results from the average hours worked during the Standard Measurement Period (or the Initial Measurement Period in the case of a new seasonal or variable hour employee). A Stability Period must be at least as long as the Standard Measurement Period but no shorter than 6 months.

Standard Measurement Period. This is the duration of time between 3 and 12 months (chosen by the employer) that will be used for determining if an ongoing variable hour employee is a full-time employee. The Standard Measurement Period must end no more than 90 days prior to the beginning of the Stability Period.

Seasonal Employee. This is an employee who performs services on a seasonal basis, such as an employee hired exclusively for the holiday season. Generally, seasonal employees are those hired into a position for which the customary annual employment period is six (6) months or less and which begins at approximately the same time of each calendar year. The proposed regulations do not define the term with specificity for purposes of the law's shared responsibility provisions. Accordingly, through at least 2014, employers are permitted to use a reasonable, good faith interpretation of the term "seasonal employee" for these purposes.

Variable Hour Employee. This is an employee who, at the start of employment, the employer cannot in good faith determine whether the individual is expected to average 30 hours of service per week during an initial measurement period. This applies to both new and ongoing employees.

EXAMPLE 12-MONTH SMP, SAP & SSP:

Example 1: Calendar Year PlansStandard Measurement Period

Start: 11/1/2019

Stop: 10/31/2020

Standard Administrative Period (60 Days)

Start: 11/1/2020

Stop: 12/31/2020

Standard Stability Period

Start: 1/1/2021

Stop: 12/31/2021

Example 2: Non-Calendar Year PlansStandard Measurement Period

Start: 6/1/2019

Stop: 5/31/2020

Standard Administrative Period (30 days)

Start: 6/1/2020

Stop: 6/30/2020

Standard Stability Period

Start: 7/1/2020

Stop: 6/30/2021

ACA Lookback Periods

New Hires

Since new hires may start at different times during the year, this report should be run monthly.

To run the report, go to **Reporting >> Client Reports**

Select the report called: **ACA FT Lookback Report – New Hire**

New Hires, enter as of date (use same day of the month every month)

Adjust the New Hire Measurement Period: if needed to match your policy (Default is 12 months)

Select Excel Under format options then click on **Generate Report** in the black action bar.

Click on **Go to My Reports Queue**

Click on **View Report** hyperlink. (Click refresh if hyperlink does not show)

Ongoing employees

Unlike the New Hires report, this report should be run in at the close of the Standard Measurement Period (SMP)

To run the report, go to **Reporting >> Client Reports**

Select the report called: **ACA FT Lookback Report Ongoing - Ongoing Employees**

Enter the from date as **(first day of SMP)** and a to date as **(last day of SMP)** of the current year. (Measurement Period needs to match your policy.)

Select Excel Under format options then click on **Generate Report** in the black action bar

Click on **Go to My Reports Queue**

Click on **View Report** hyperlink. (Click refresh if hyperlink does not show)

To confirm your measurement periods, Go to **Client Management >> ACA Setup Options >> ACA Measurement Policies**

Click on **Ongoing Measurement Period** tab.



Managing Employment Status History

The status history for each employee can be verified and edited on the Employment Status History screen:
Employee Management >> Employee Maintenance >> Employment Status History.

Employment Status History

Employment Period:

Effective Date	End Date	Change Reason	Employment Status
11/11/2019			Active
4/16/2016		Resignation	Terminated
3/15/2016	4/15/2016		Inactive
2/14/2015	3/14/2016		Active

+ Add New Edit Refresh Save Cancel

Employment Status

* Employment Status:

* Hire Date:

NOTE: To terminate or activate an employee, use the Employee General Screen.

* Employee Number:

Timeclock ID:

Employee Notes

Notes:

Service

Length of Service: 1 year, 10 months, 26 days

Break in Service: 3 years, 6 months, 27 days

ACA Rehire Rules

No Rule of Parity-13 week rule: Employee is considered a New Hire for ACA Purposes.

No Rule of Parity-26 week rule: Employee is considered a New Hire for ACA Purposes.

Rule of Parity-13 week rule: Employee is considered a New Hire for ACA Purposes.

Rule of Parity-26 week rule: Employee is considered a New Hire for ACA Purposes.

Employers Should:

Ensure employees have accurate Hire Dates

Ensure employees have accurate Termination Dates (if applicable)

Terminate employees using the 'Terminate' button on the 'General' Screen

Terminated employees should NOT have a status of 'Inactive'

Employee Management >> Employee Maintenance >> General

Click **Terminate** in the black action bar

Ensure employees have accurate Rehire Dates (if applicable)

If someone was previously employed with the company, they should be 'Rehired' and not treated as a new hire. You can locate previous employees by changing the employment status view to 'Terminated' and clicking 'Apply' using the filter.

Employee Management >> Employee Maintenance >> General

Click on **Rehire** in the black action bar

Ensure employees have accurate Leave of Absence (LOA) Dates (if applicable)

If employees are on a Leave of Absence and still eligible for benefits, be sure your eligibility rules are set up to include this Status.

Employee Management >> Employee Maintenance >> Employment Status History



Managing Employment Category

The category history for each employee can be verified and edited on the Employment screen:
Employee Management >> Employee Maintenance >> Employment

If PT employee has worked an average of 30 in a measurement period, be sure there is an effective date equal to the first day of the stability period reflecting PT with box checked of for Hours met for ACA Full-time Status. This can be done manually by following these steps.

Click on **Add New** in the black action bar

Enter Effective date (First day of stability period)

Employment category: **Part Time**

Check off box for Hours met for ACA Full-time Status

Employment

Employment:

Effective Date	Employment Category	ACA Status	Hours met for ACA FT Status	Statutory	Qualified Pension	Highly Compensated
11/11/2019	Full Time	ACA Full Time				

+ Add New Edit Delete Refresh Save Cancel

Employment Category Information

* Effective Date:

* Employment Category:

ACA Employment Status:

Hours (e.g., Variable) met for ACA Full-time Status

Statutory Employee

Qualified Pension Plan

Highly Compensated

Corporate Officer

Ownership Percent:

Full Time Equivalent:

Change Reason:

Employers Should ensure employees have an employment category with an accurate effective date and, if applicable, a history of category changes with accurate effective dates. This can be checked by running **ACA FT Lookback Report – New Hires** each monthly and **ACA FT Lookback Report – Ongoing Employees** during the Administrative period.

Run the & offer medical benefits if necessary.

ACA FT Lookback – New Hires

This report should be run every month. It will identify PT employees who have completed their Initial Measurement period for ACA reporting/tracking employee hours. It will populate with all new hires and provide the number of months left until a new hire has reached the end of their initial measurement period. If a part-time employee has averaged over 30 hours a week during this time, then you will need to manually create a new employment category + effective date and mark them as 'Hours met for ACA Full-time Status'. As such, their 1095C form will reflect that an offer of benefit coverage was made. An employer should extend an offer of coverage.

Report can be generated by going to **Reporting >> Client Reports**



Importing Benefit Elections

If you wish to import the employee elections, download the template [Fully Insured.xlsx](#) for Fully Insured Employers or [Self Insured Template.xlsx](#) for Self-Insured Employers

Populate the template(s) and save as an XLS or CSV. For Self-Insured Employers, you must update and import Contacts (Dependents) first.

For Self-Insured Plans, import dependents as contacts first:

- Go to **Conversion Management >> HR Data Imports**
 - Select Import Type: **Contacts**
 - File format blank, template default
 - Attach file
 - Default Company (Select from list)
 - Default Pay Group (Select from list)
 - Import Key – select **SSN** or **Employee #** used in file
- Select Next, Review file for errors and complete import.

For Fully Insured and Self-Insured Plans, import the elections:

- Go to **Conversion Management >> Data Imports**
- Select Import Type: **Employee Benefits**
- File format blank, template default
- Attach file
- Default Company (Select from list)
- Default Pay Group (Select from list)
- Import Key – select **SSN** or **Employee #** used in file

Select Next, Review file for errors and complete import.

→ Next

Import File	Import Options
*Import Type: <input style="width: 100%;" type="text"/>	There are no additional options for the selected import type.
*Template: <input style="width: 100%;" type="text"/>	
*File Format: <input style="width: 100%;" type="text"/>	
*Attach File: <input style="width: 100%;" type="text"/> <input type="button" value="..."/>	

ACA Setup Options

You will be ready to preview & approve your 1095-C forms when all maintenance is complete.

Go to:

Client Management >> ACA Setup Options and complete the following:

- Verify ACA Reporting Groups (for multiple FEINs requiring a group, if applicable)
 - This is where you combine companies under common ownership, for ACA reporting. Only make changes as they occur.
 - If you only have one entity, no action is required.

- Verify ACA Report Options for 2021
 - This is where you create your new reporting year. +Add New to create the new reporting year and assign a contact to appear on the 1095s.
 - ACA Certifications of Eligibility: Determine if you are using the General Offer Method or one of the two alternative methods listed. Only check one if you use one of the options listed. If you are using the General Offer Method, do not check a box, as that is the default. Your broker should be able to provide guidance if you are unsure.

- Verify ACA Measurement Policies (to measure ACA Variable employee hours, if applicable). The most recent Ongoing Measurement Period Stop Date should be no earlier than 12/31/2021.
 - Preview your 2021 ACA Forms in ACA FormsApproval
 - Preview Report: Run this first and go to the last page to see if you have any critical errors, such as missing SSNs or addresses. Make any corrections to employee data in the system. These errors may prevent us from filing with the IRS, if not corrected.
 - Preview Forms: Run this to see how the actual 1094 and 1095s will be printed. Review all employees for accuracy. Make any necessary corrections in the system, until all forms are correct.

[Note: You may Preview your forms as many times as needed.](#)

- Approve your 2021 ACA Forms by clicking “Approve Forms” under ACA FormsApproval.
 - Do not approve forms for filing year 2021 before January 3, 2022.
 - Once approved, NCR will print, fold, and seal your forms and send to you, to distribute to your employees postmarked by January 31, 2022. (IRS may extend this deadline)
 - January 14, 2022: Last day to approve forms and guarantee on time delivery to employee using main company delivery option. **(Date subject to change if IRS extends deadline)**
 - **Forms approved on or after January 15th will be mailed directly to employees & additional charges will apply.**
 - NCR will file the 1094 and 1095s with the IRS, on your behalf, by the filing deadline.

