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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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 programed 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.

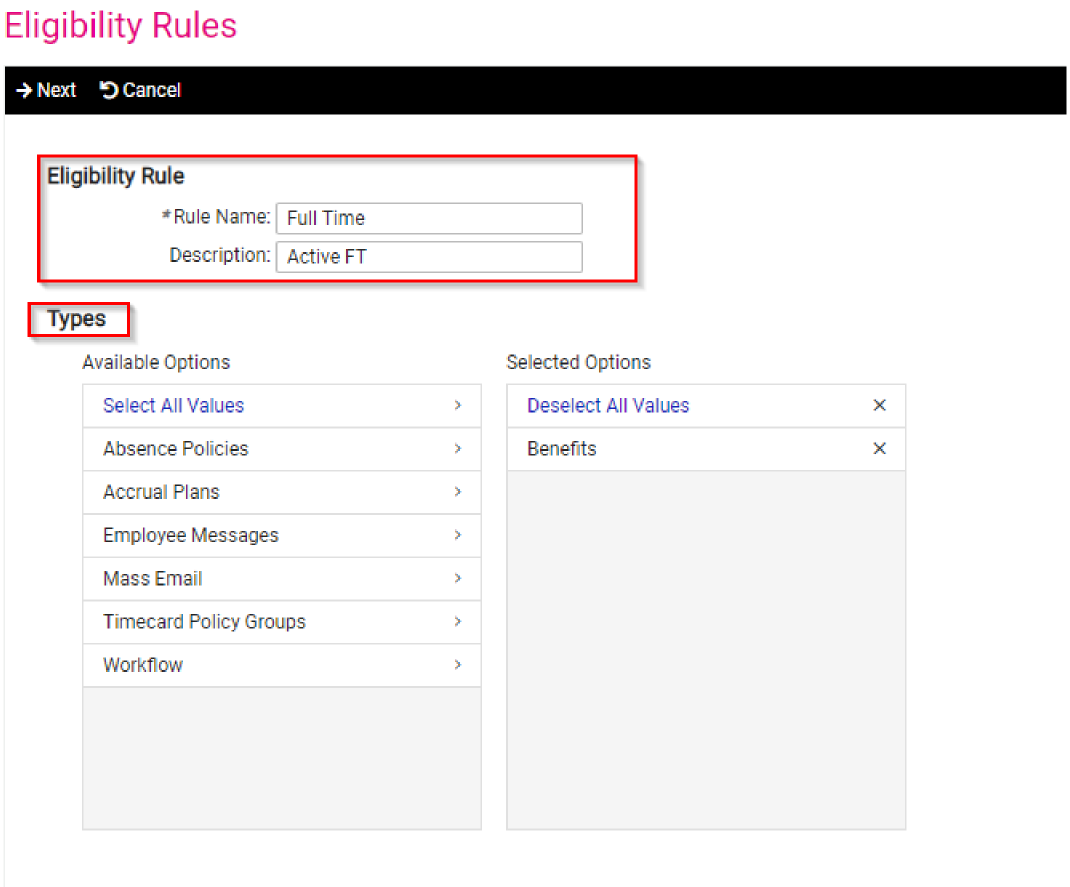
4. Medical plans and rates

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


Form 1095-C
Employer-Provided Health Insurance Offer and Coverage
VOID
CORRECTED
Part I Employee
Applicable Large Employer Member (Employer)
Part II Employee Offer of Coverage
Plan Start Month (Enter 2-digit number)
All 12 Months | Jan | Feb | Mar | Apr | May | June | July | Aug | Sept | Oct
Part III Covered Individuals

Adding Eligibility Rules (Active Full Time)

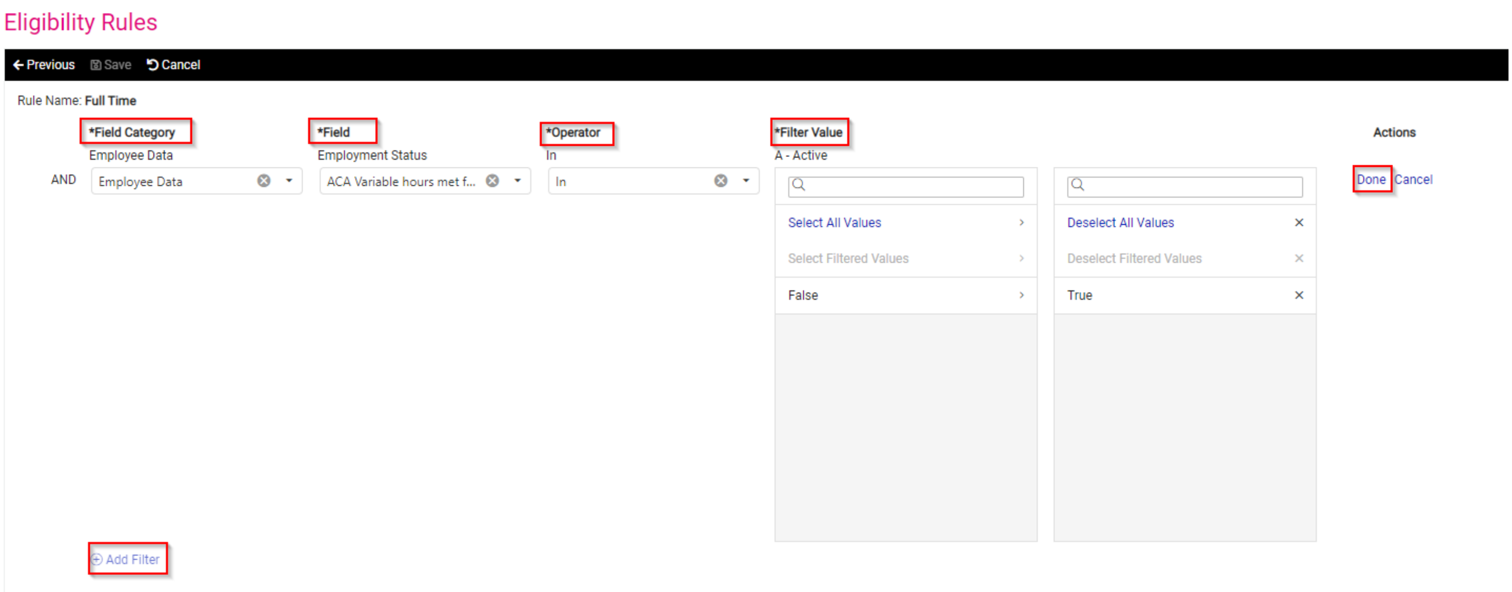
Client Management >> **Benefits** >> **Eligibility Rules**
Click on **Add New** in the black action bar
Populate the **Rule Name** and **Description**
In the **Types** column click **Benefits** to move over to selected options column
Click **Next** in the black action bar



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



***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:

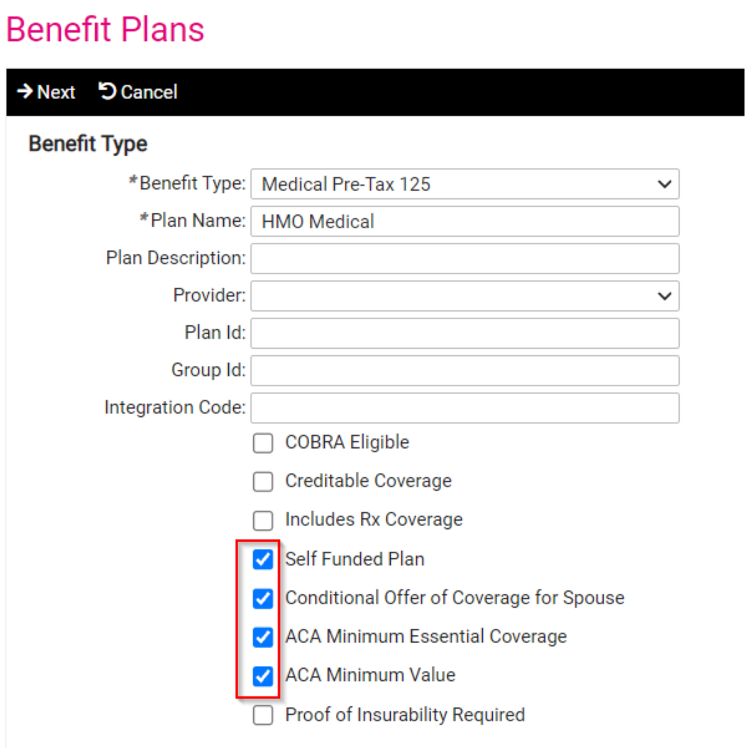
- You changed from Self-Funded to Fully Funded (or vice versa)
- Your New Hire Probationary Period has changed
- The eligibility rules have changed
- You switched or added new insurance carriers

*** 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)



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

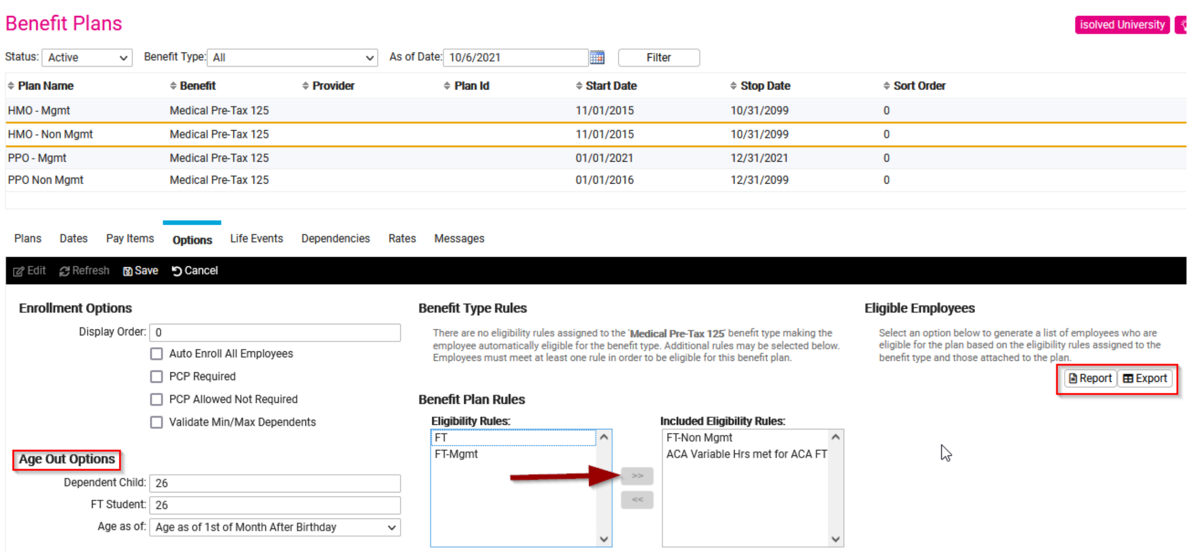
Your company policy may vary from the example above.

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.



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

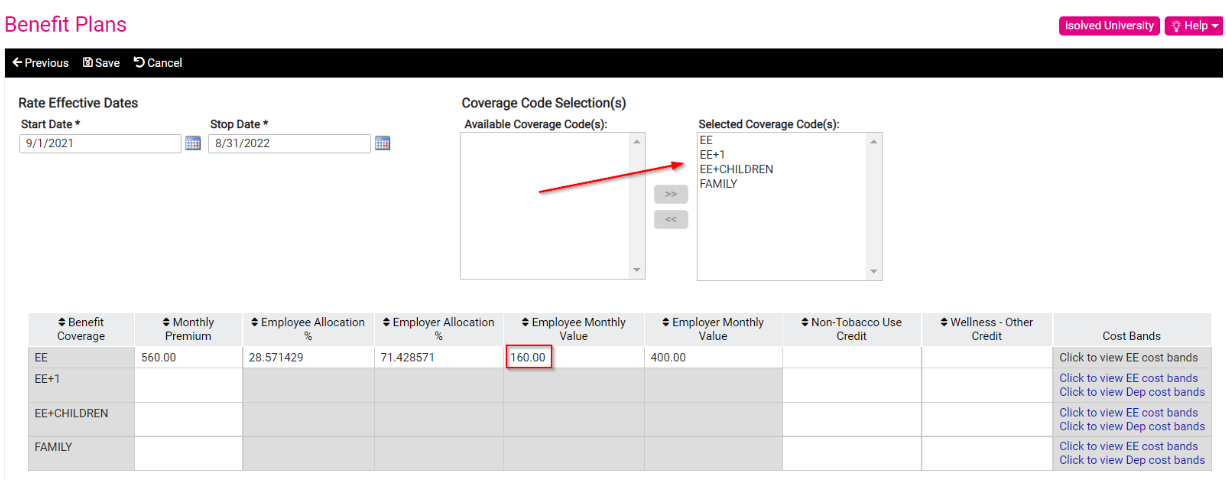
Rate Effective Dates

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.



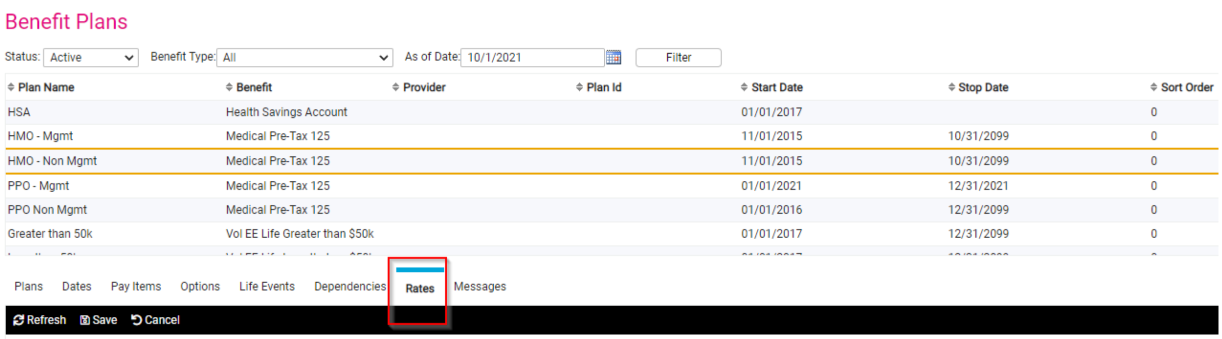
If your plans utilize cost bands, please reach out to ACAsupport.HCM@ncr.com for further guidance

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)



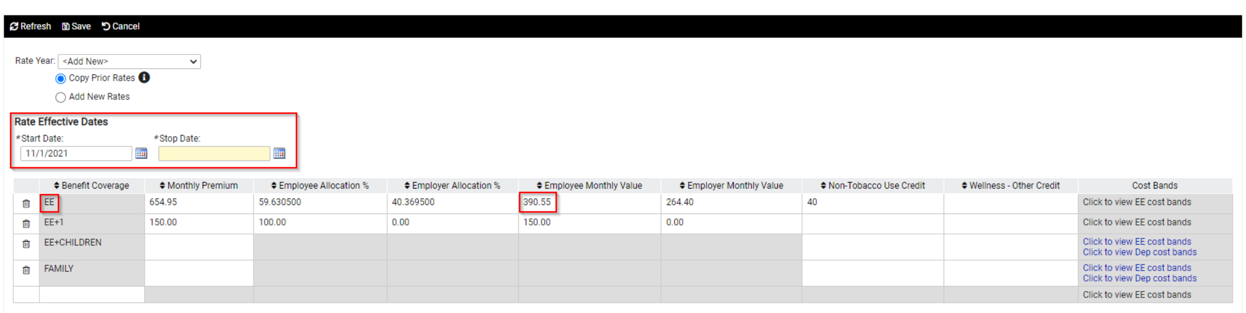
Click on arrow for the drop-down bar to change the **Rate Year**.
Select <Add New>
Click on radio button to Copy Prior Rates

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.

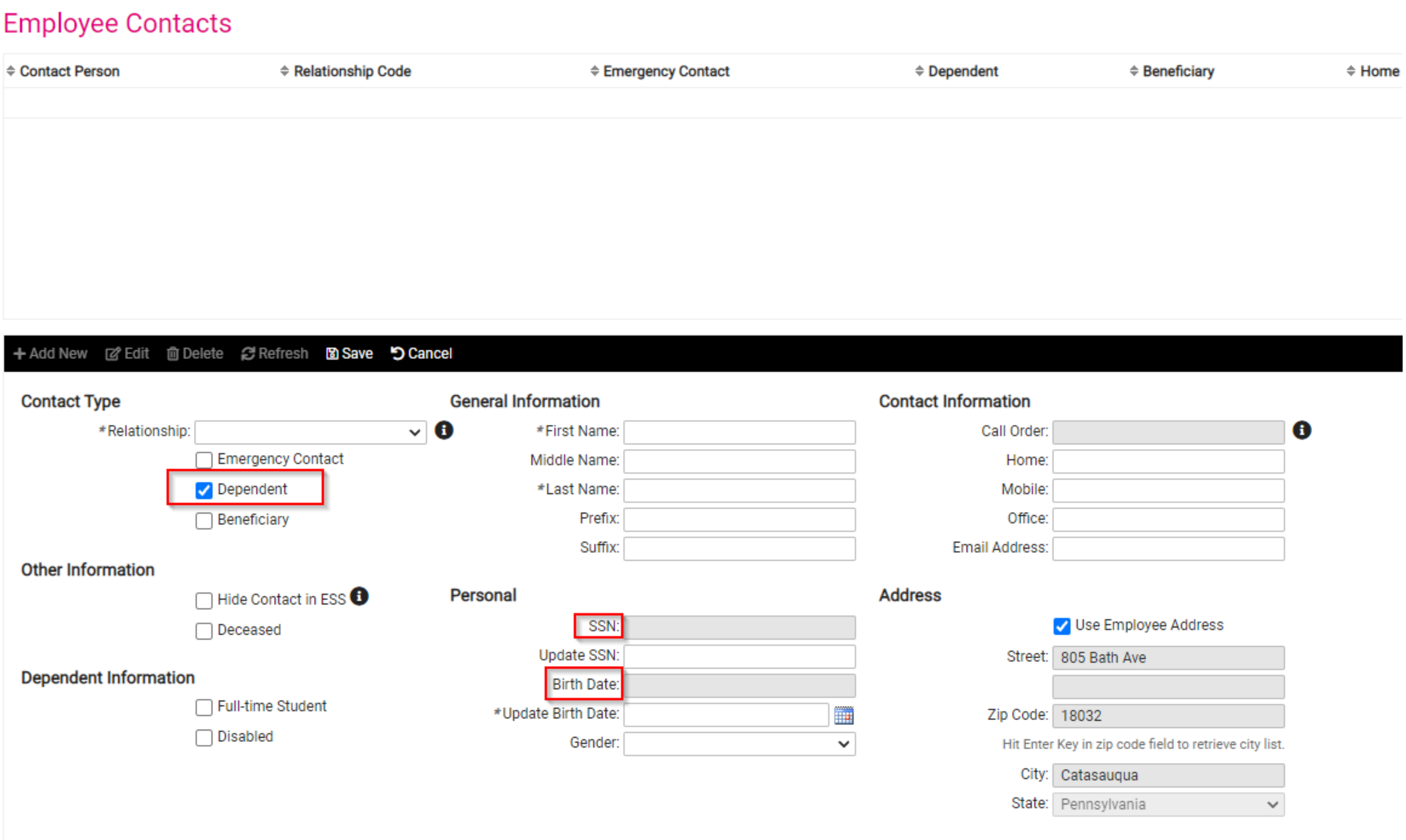


If your plans utilize cost bands, please reach out to ACAsupport.HCM@ncr.com for further guidance

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

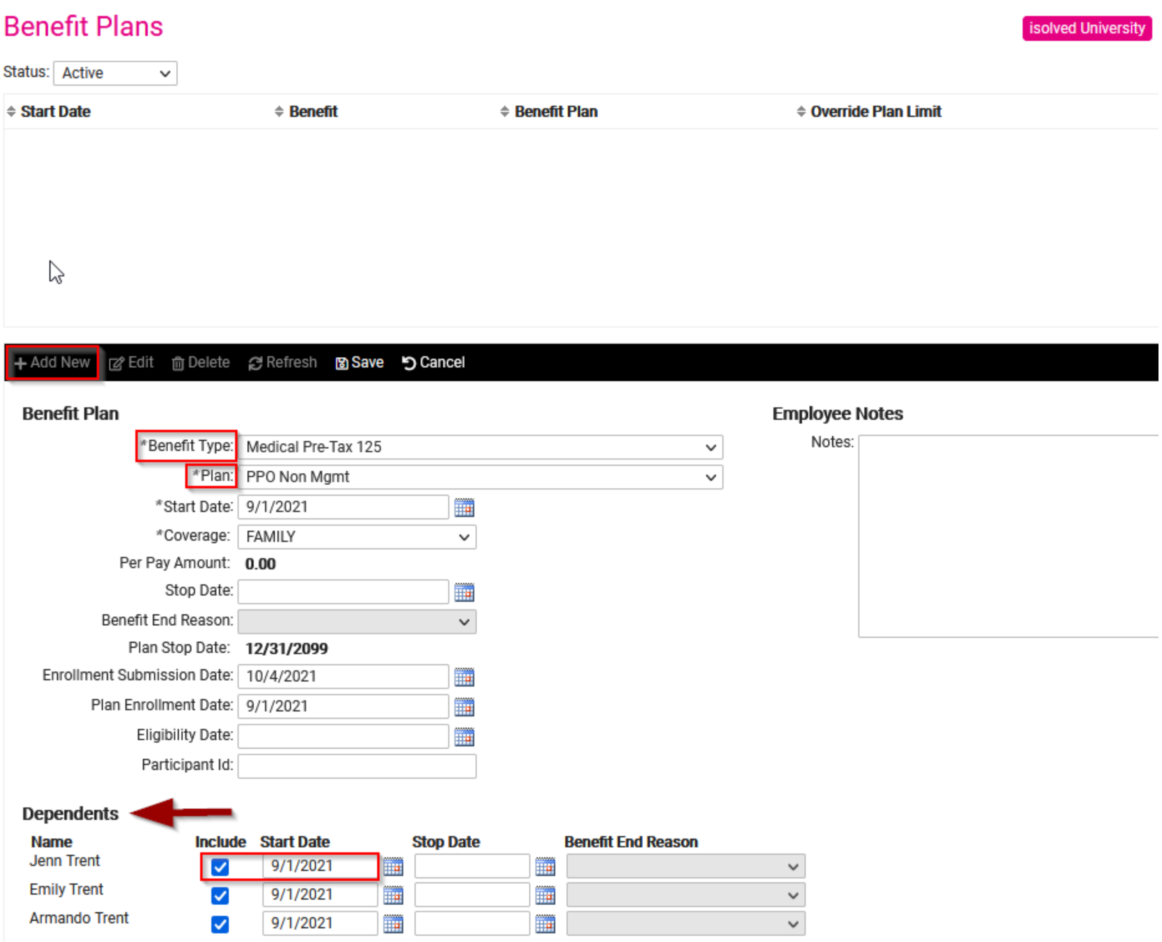
Click Save in the black action bar



Employee 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.

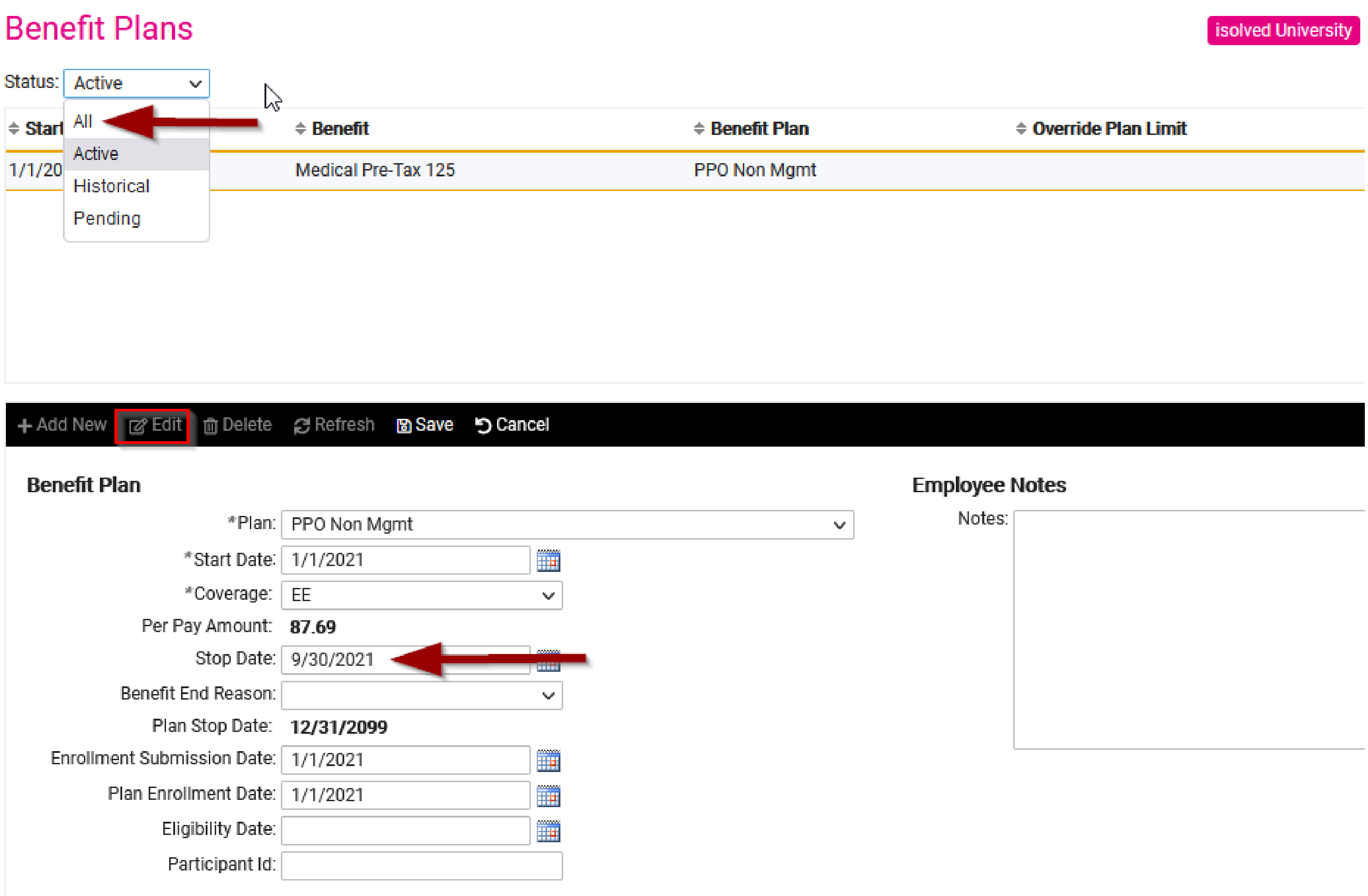


Note: If there are no medical plans listed in the drop-down menu for medical type it could be one of the following.

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

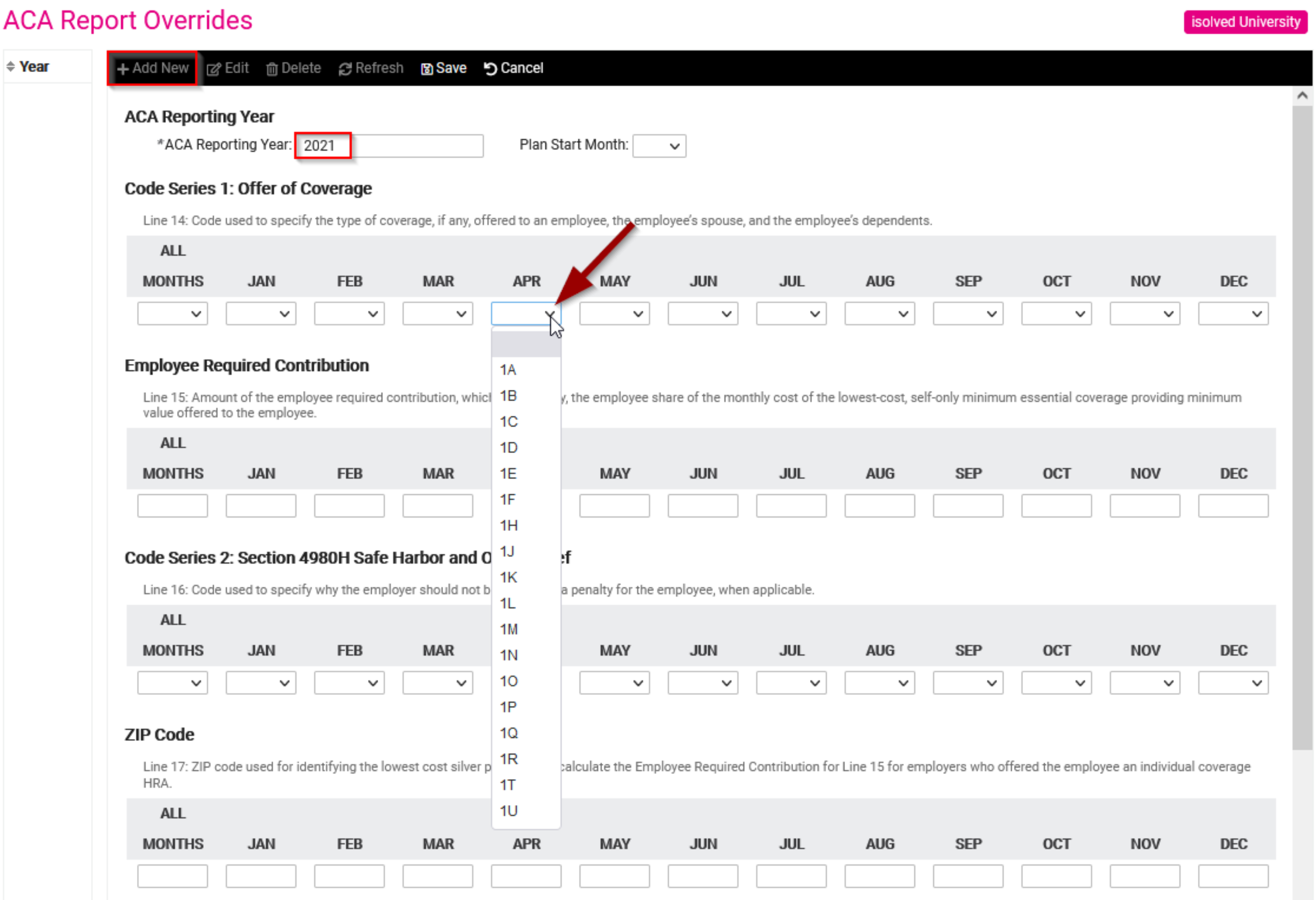
Edit Employee Benefit Enrollment

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



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 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.

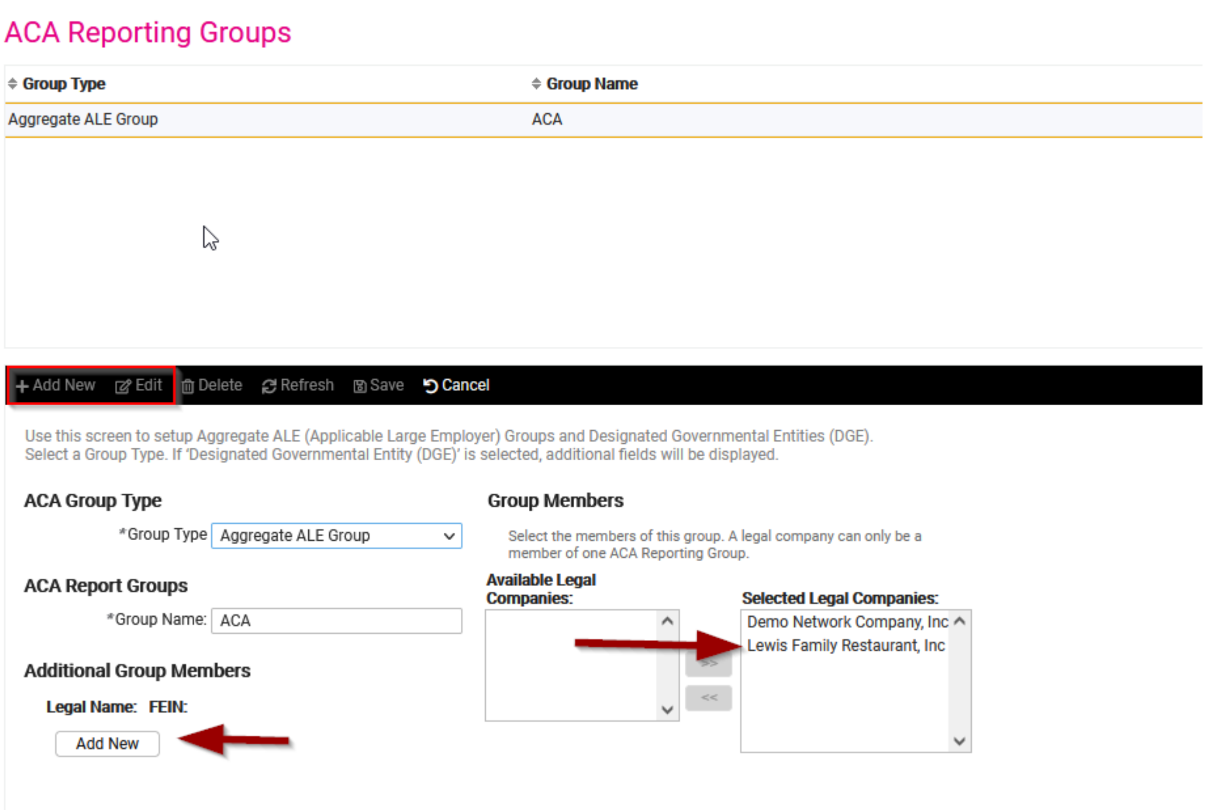
Group Name: Key in the name for the Aggregate Group you are setting up. You can have more than one Group Name with selected entities in each.

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

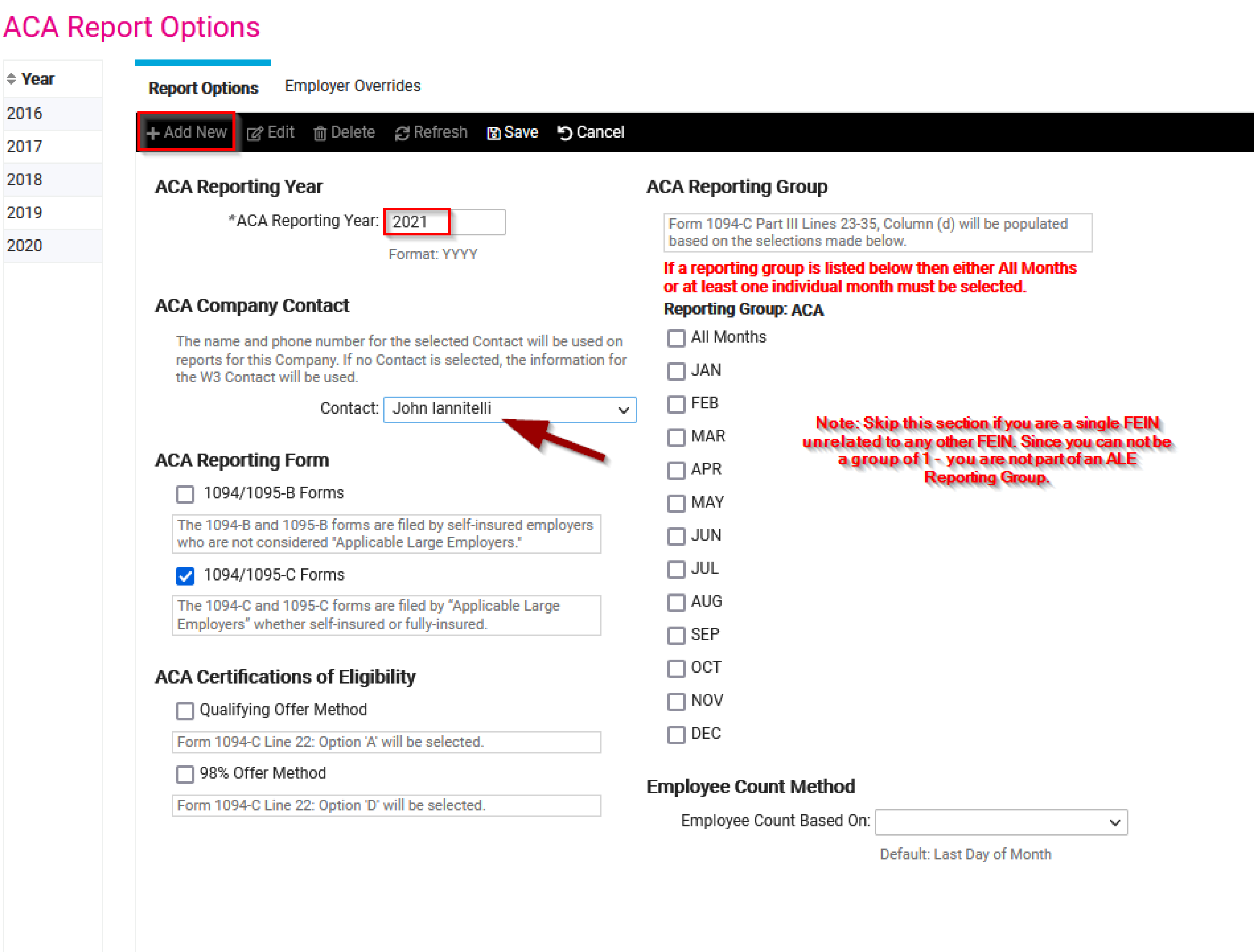


ACA Report Options

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

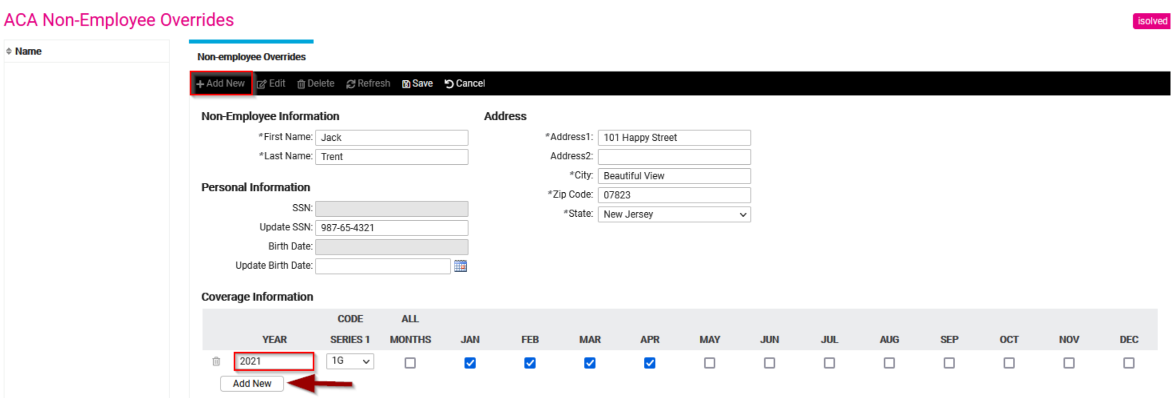


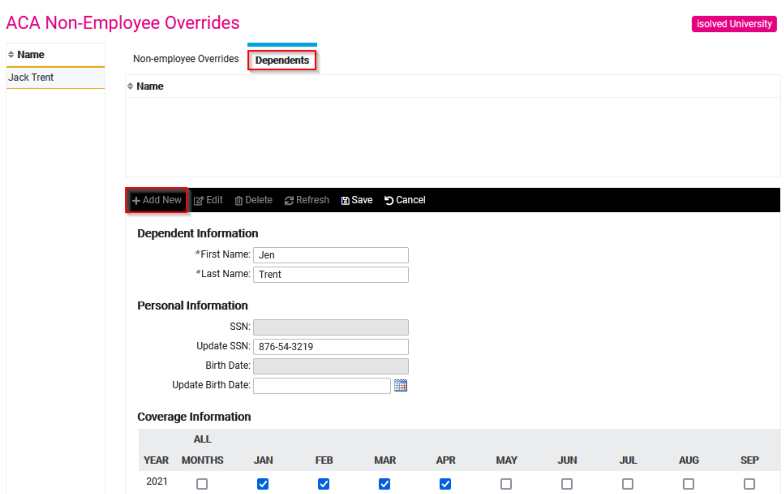
ACA Non-Employee Overrides

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

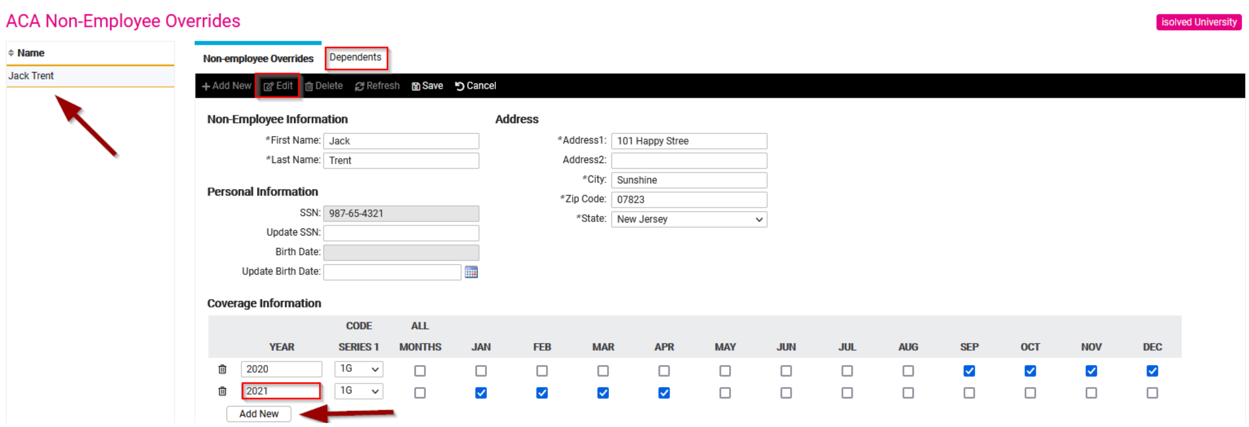




ACA Non-Employee Overrides (Continued)

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 Forms Approval

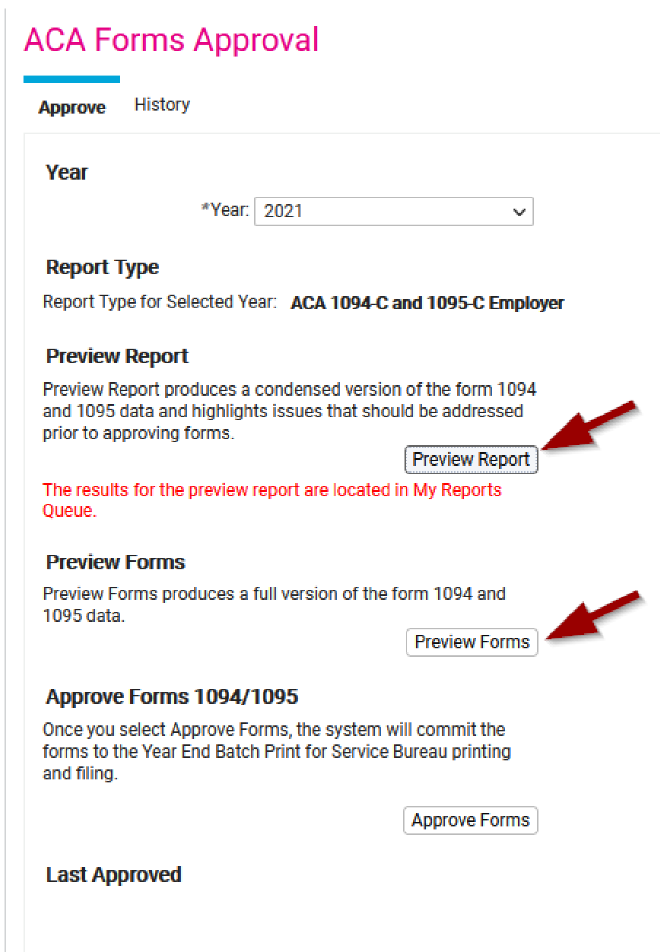
To Review forms:
Client Management >> ACA Setup Options >> ACA Forms Approval

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.

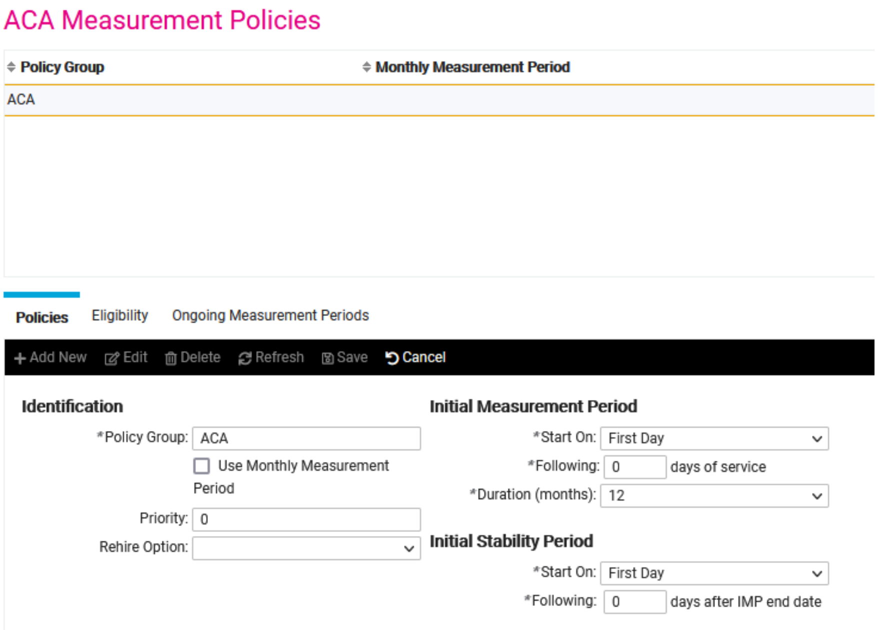
Repeat steps for each company you have on system

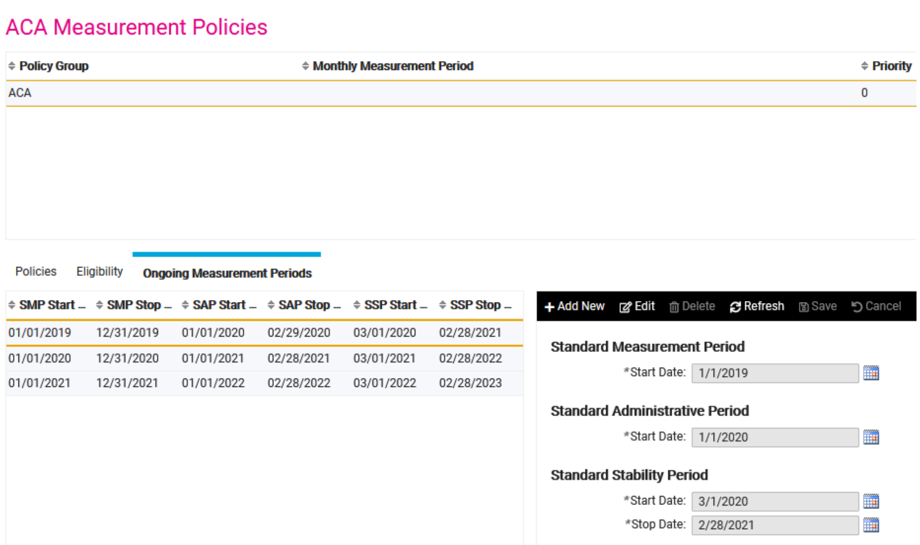


ACA Measurement Policies

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 ***





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 Plans

Standard Measurement Period	Standard Administrative Period (60 Days)	Standard Stability Period
Start: 11/1/2019	Start: 11/1/2020	Start: 1/1/2021
Stop: 10/31/2020	Stop: 12/31/2020	Stop: 12/31/2021

Example 2: Non-Calendar Year Plans

Standard Measurement Period	Standard Administrative Period (30 days)	Standard Stability Period
Start: 6/1/2019	Start: 6/1/2020	Start: 7/1/2020
Stop: 5/31/2020	Stop: 6/30/2020	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

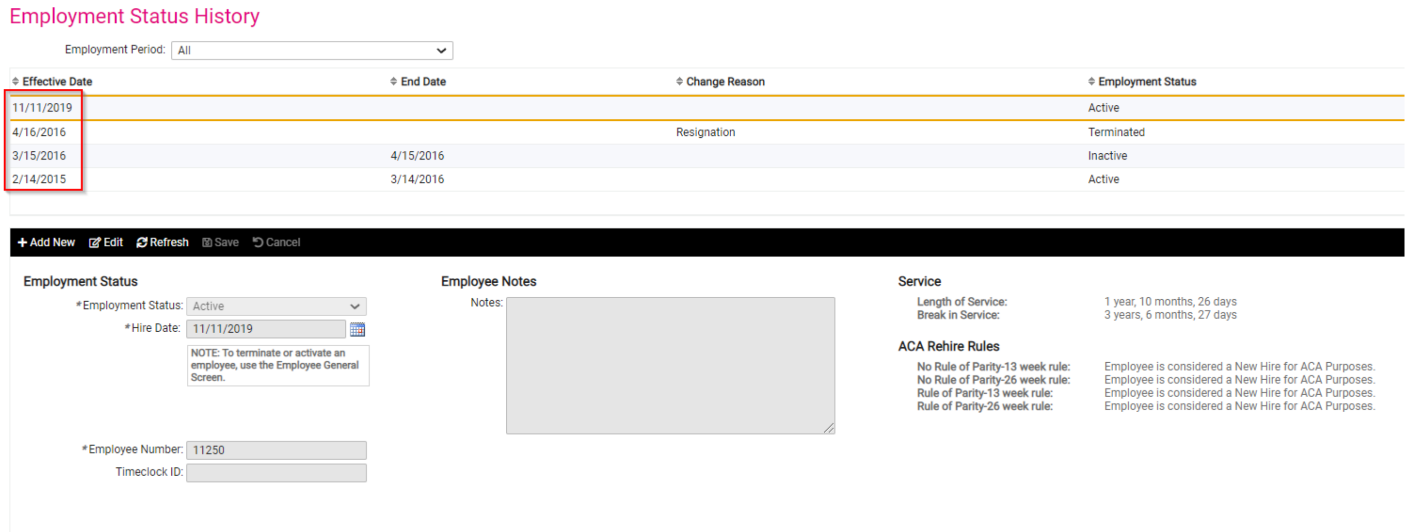
New Hires, enter as of date (use same day of the month every month)
Adjust the New Hire Measurement Period: if needed to match your policy (Default is 12 months)
Select Excel Under format options then click on Generate Report in the black action bar.
Click on Go to My Reports Queue
Click on View Report 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.



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

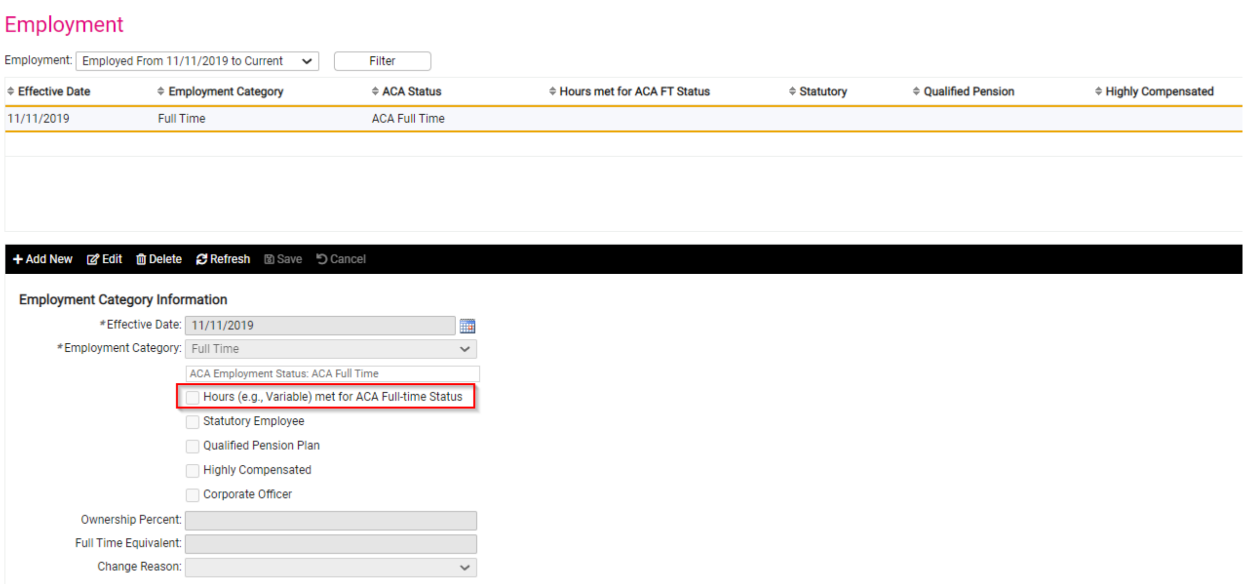
If PT employee has worked an average of 30 in a measurement period, be sure there is an effective date equal to the first day of the stability period reflecting PT with box checked of for Hours met for ACA Full-time Status. This can be done manually by following these steps.

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



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:

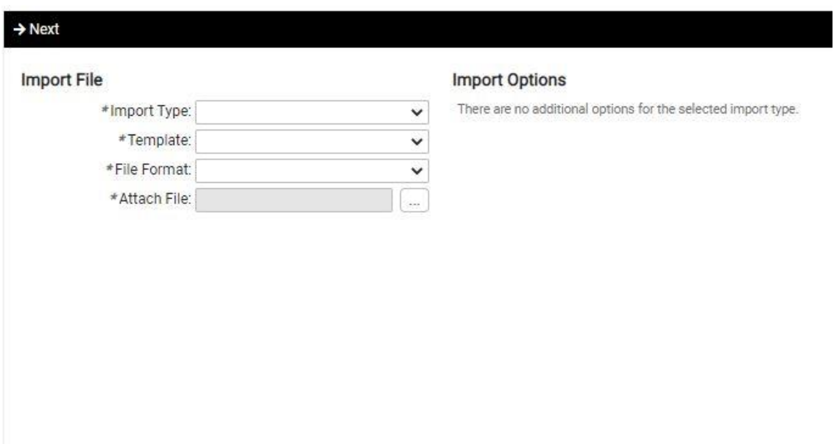
- Go to Conversion Management >> HR Data Imports
- Select Import Type: Contacts
- File format blank, template default
- Attach file
- Default Company (Select from list)
- Default Pay Group (Select from list)
- Import Key – select SSN or Employee # used in file

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.



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 Forms Approval
  - 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 Forms Approval.
  - 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.