

Affordable Care Manual

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For best viewing quality, expand the settings icon and select Quality of 720p or greater:



When it comes to Affordable Care Act fines and penalties, guesswork can be risky business! Our ACA tool will take the guesswork out of the equation, keeping you in compliance no matter what happens in Washington. It's flexible enough to adapt to changing regulations in a timely manner.

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Appendix A - ACA Initialization Process

What the Initialization Process Will Do

What the Initialization Process Will Not Do

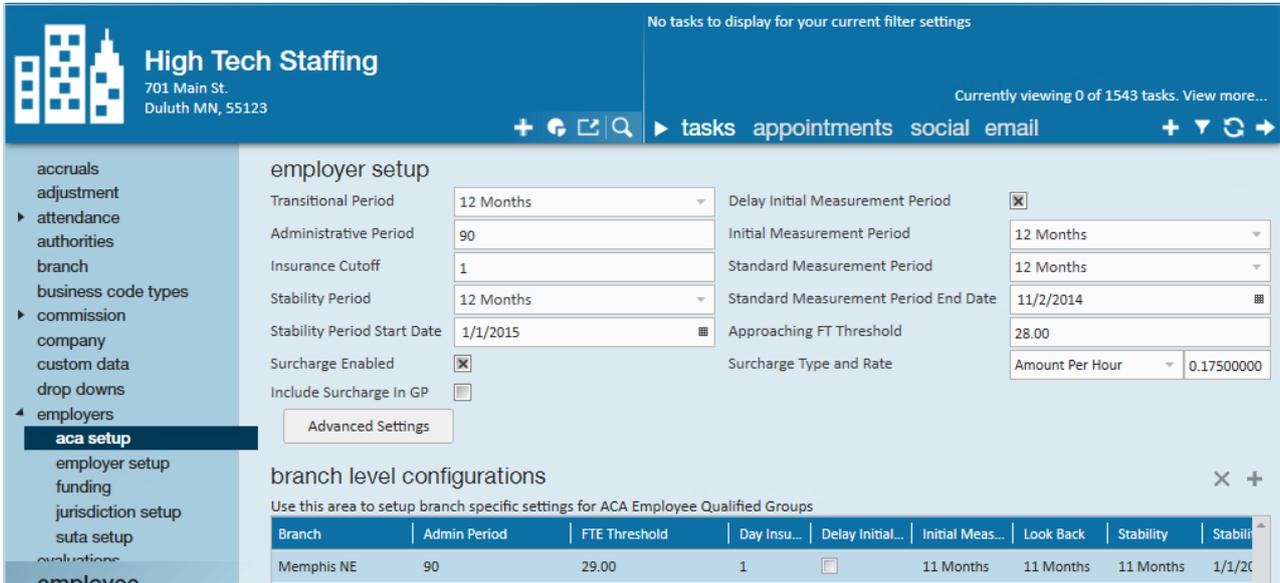
Appendix B - How and When are Employee ACA Cycle Dates Calculated

ACA Administration

Prior to using the Affordable Care Act (ACA) functionality there are several settings for which you will need to make selections. These settings are in the administration area of TempWorks Enterprise.

ACA System Settings

To access the ACA setup in administration, choose all options/administration/employers. Select the employer (FEIN) you are setting up by double clicking on it in the grid list. In the left menu click on the ACA setup option.



The screenshot displays the 'High Tech Staffing' administration interface. The top navigation bar includes the company logo, name, address (701 Main St., Duluth MN, 55123), and a search bar. The left sidebar lists various system settings, with 'aca setup' highlighted under the 'employers' section. The main content area is split into two panels. The left panel, titled 'employer setup', contains several configuration fields: 'Transitional Period' (12 Months), 'Administrative Period' (90), 'Insurance Cutoff' (1), 'Stability Period' (12 Months), 'Stability Period Start Date' (1/1/2015), 'Surcharge Enabled' (checked), and 'Include Surcharge In GP' (unchecked). The right panel, titled 'branch level configurations', includes a table for setting branch-specific parameters for ACA Employee Qualified Groups. The table has columns for Branch, Admin Period, FTE Threshold, Day Insu..., Delay Initial..., Initial Meas..., Look Back, Stability, and Stabili. A single row is visible for 'Memphis NE' with values: 90, 29.00, 1, a checkbox, 11 Months, 11 Months, 11 Months, and 1/1/2015.

Following is a list of the fields and what their function/purpose is in regards to ACA behavior in the system:

Transitional Period: (Also known as the look back period.)

- Select a length, in months, from the drop down field.
- Transitional period is used only for the initial start of ACA tracking. The rules for ACA change after the transitional period (sometimes referred to as the look back measurement period)
- Things to take into consideration for your transitional period length are:
 - the length of your selected administrative period in conjunction with your insurance plan year start date.
 - After the initial transitional period the rules for the initial measurement period and stability period come into play.

Administrative Period:

- Enter a number of days in this field.
- The administrative period is the period of time between when an employee is eligible for

insurance and the time that you must have them enrolled in an insurance plan.

- The maximum length of an administrative period is 90 days, however when selecting your administrative period you will want to take into consideration insurance enrollment dates
- as they correlate to hire dates. In other words; if your insurance enrollment only allows for beginning of the month enrollments (vs weekly) you may want to consider a 60 day administrative period.
- ***Note*** Employees who are not being offered coverage will still be reflected in the administrative period.

Insurance Cut Off:

- Enter a number in this field.
- The insurance cut off is the day of the month that your insurance enrollment is due. This field will be used to calculate approaching non-compliance of enrollment for eligible employees.

Stability Period:

- Select a length in months from the drop down field.
- The stability period is the period of time after the start of the insurance requirement that any eligible employee regardless of ongoing ACA status must have insurance available to them.
- Your stability period may not be less than your transitional period or measurement periods. Another way of looking at the stability period is it is the period of time between insurance open enrollment periods.
 - So if your insurance enrollment period ends April 30th and reoccurs yearly, then your stability period would be 12 months long and start on May 1st.
- The significance of this period is if it has been determined that an employee should receive insurance, they may not have their insurance terminated until the end of the stability period unless their employment is terminated as well.
 - E.g. John Doe worked 32 hours per week for the past year and we gave him insurance starting May 1st and have selected a 12-month stability period. On June 30th, John comes to us and lets us know that he is only able to work 20 hours per week due to family reasons. Due to the quality of John's work, we want to keep him around.

Despite knowing that John is only going to be working 20 hours per week, we cannot revoke his insurance until May 1st of the following year without incurring penalties.

Stability Period Date:

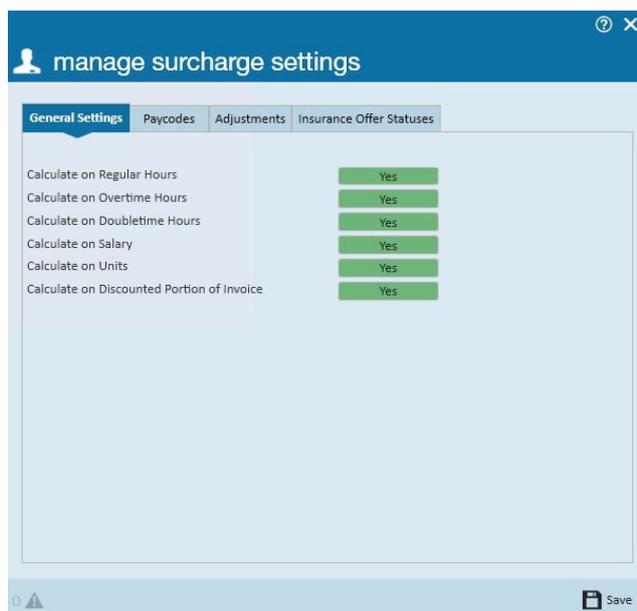
- Select a date in this field.
- The stability period start date is the first date following the open enrollment deadline date, or you may look at it as the start date of your insurance plan coverage period.

Surcharge Enabled:

- Click to put an X in the box if you would like to activate ACA surcharges for your customers.
- An ACA surcharge is a percentage of billings that will be added to the customer invoices to recoup some of your costs associated with ACA.

Surcharge Advanced Settings

If surcharges are going to be billed to help offset the cost of ACA insurance, you can also determine what hours, paycodes, adjustments, and offer statuses will be used to determine the surcharge amount.

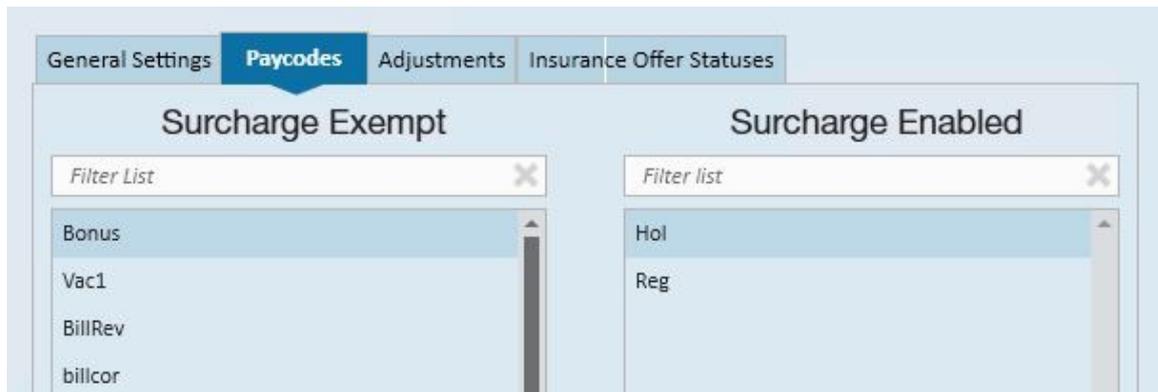


The screenshot shows a web application window titled "manage surcharge settings". It has a dark blue header with a user icon and a close button. Below the header are four tabs: "General Settings", "Paycodes", "Adjustments", and "Insurance Offer Statuses". The "General Settings" tab is active and displays a list of six settings, each with a green "Yes" button:

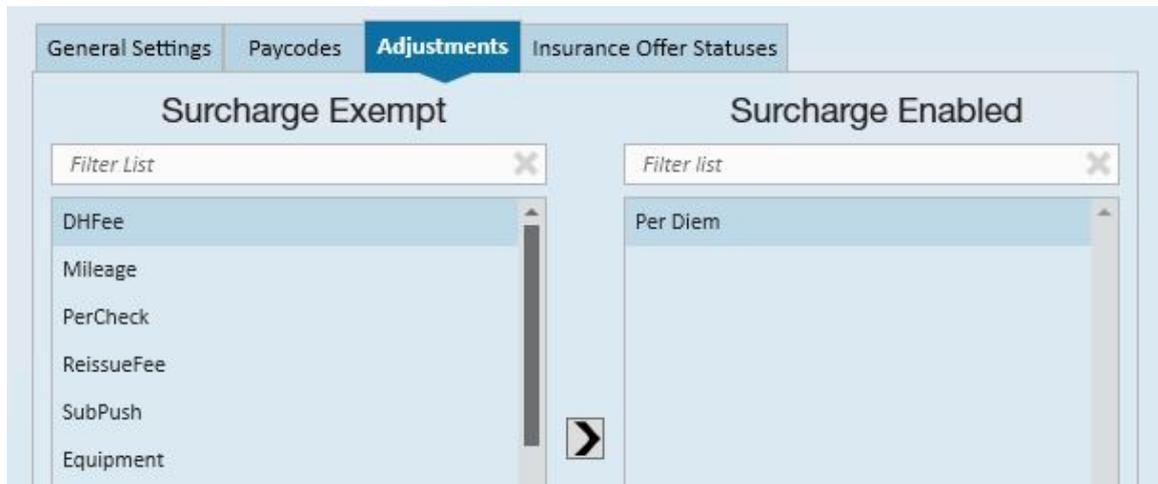
Setting	Value
Calculate on Regular Hours	Yes
Calculate on Overtime Hours	Yes
Calculate on Doubletime Hours	Yes
Calculate on Salary	Yes
Calculate on Units	Yes
Calculate on Discounted Portion of Invoice	Yes

At the bottom of the window, there is a "Save" button and a warning icon.

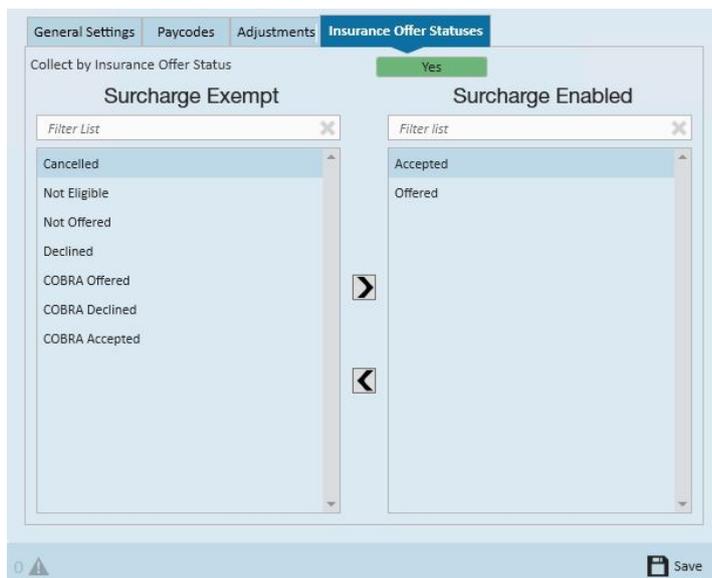
General Settings: Select each type of hours/pay that should be used in calculating the surcharge.



Paycodes: Select the paycodes that should be used in calculating the surcharge.



Adjustments: Select the adjustment codes that should be used in calculating the surcharge.



Insurance Offer Statuses: Select the insurance offer statuses that should be used in calculating the surcharge.

Note to select the options in the paycodes, adjustments, and insurance offer status forms click

to select the options desired on the left (exempt) then click the right facing arrow to move the option to the enabled (right) side.

Note for insurance offer status only, if you would like to extend the surcharge based on status, make sure the yes/no toggle to set to yes.

ACA Setup Continued:

Delay Initial Measurement Period	<input checked="" type="checkbox"/>
Initial Measurement Period	12 Months
Standard Measurement Period	12 Months
Standard Measurement Period End Date	11/2/2014
Approaching FT Threshold	28.00
Surcharge Type and Rate	Amount Per Hour 0.17500000

Delay Initial Measurement Period:

- Click to put an X in the box if you would like the insurance coverage start date delayed to the first day of the following month after enrollment.
- You will want to check this box if your insurance company does not allow mid-month enrollments for employees.
- If this box is checked and you have a 90 day administrative period, the system calculations will take this into account when doing the insurance due date calculation. In other words you do not need to modify your administrative period to less than 90 days to accommodate the insurance coverage start date delay.

Initial Measurement Period:

- Select a length in months from the drop down field.
- The reason the initial measurement period exists is when a variable-hour employee starts working for you, you don't have any hour's history to determine their insurance eligibility and they might have begun working in the middle of the standard measurement period.
- Because it wouldn't be fair to you or them to judge simply based off of how much they worked in the remainder of the standard measurement period, the initial measurement period exists to give you time to gather that information before their eligibility is determined and you start facing penalties.

Standard Measurement Period:

- Select a length in months from the drop down field.
- The standard measurement period is used for employees who have worked the full number of months of your transitional period or your initial measurement period.
- When determining whether or not ongoing employees are eligible for health insurance, you look at the hours worked by those employees during the standard measurement period (or transitional period for year one of ACA).
- In order for an employee's ACA status to be determined based off of the standard measurement period, they must have worked the entire duration of the standard measurement period. In short, it is the period of time that you use to determine insurance eligibility for the next stability period.

Standard Measurement Period End Date:

- Select a date in this field.
- This is the date that your standard measurement period ends.
- The time between the end of your standard measurement period and the start of the next stability period is your administrative period.
 - So, if your stability period starts on January 1st and your administrative period is 90 days, your standard measurement period must end no earlier than October 2nd.

Approaching FT Threshold:

- Enter in a number of weekly hours in this field. This number is used in system calculations for any employees not coded with an ACA status of fulltime.
- This calculation uses the employee's average weekly hours during the current measurement period (either initial measurement or standard measurement depending on which period they are in) to flag the employee as approaching full time equivalent (FTE) status.
- These calculations will be performed during the daily maintenance procedure that is automatically run on your system.

Surcharge Type and Rate:

- Select the basis for the surcharge; percentage of payroll cost, amount per hour, flat rate

per aldent or percentage of invoice.

- If you select *percentage of payroll cost*, the surcharge will be calculated based on the percentage of the cost of the payroll.
- If you select *amount per hour*, this is the amount per hour billed (based on the ACA advanced settings selected) that will be added to your customer's invoices.
- If you select *flat rate per aldent*, the amount billed will be per employee being billed.
- If you selected *percentage of invoice*, this is the percentage of the billings (based on the ACA offer statuses selected) that will be add to your customer's invoices.
- Within the rate field enter the percentage or dollar amount appropriate for the surcharge.

Note You will have an opportunity on an individual customer and order basis to modify the amount or percentage specific to that customer/order.

If the majority of your customers will not be charged this surcharge you may want to enable the surcharge and enter 0 as the percentage amount, then for the customers you will be billing this surcharge to; you may enter the actual percentage on the customer record.

Adversely, if the majority of your customers will be charged this surcharge you may want to enable the surcharge, enter your companies' standard percentage in this field, and for any customers you do not wish to apply this surcharge to you may change the percentage to 0 on the individual customer records.

TempWorks has added some settings validation to assist you in selecting your period lengths and start and end dates. This validation is as follows:

- Standard measurement period end date must be less than stability period start date
- Difference between standard measurement end date and stability start date must not be greater than 90 days
- Stability period to be greater than or equal to measurement period

Branch Specific Settings:

The ACA settings that you select are applicable to all employee and customer records for the federal employer identification number (FEIN) that they are set up in. TempWorks allows the flexibility to apply a different set of rules for specific branches within the FEIN. This will most commonly be used for the allowable ACA exceptions for specific groups of employees.

employer setup

Transitional Period	12 Months	Delay Initial Measurement Period	<input checked="" type="checkbox"/>
Administrative Period	90	Initial Measurement Period	11 Months
Insurance Cutoff	1	Standard Measurement Period	12 Months
Stability Period	12 Months	Standard Measurement Period End Date	10/2/2014
Stability Period Start Date	1/1/2015	Approaching FT Threshold	28.00
Surcharge Enabled	<input checked="" type="checkbox"/>	Surcharge (%)	1.00000000

branch level configurations ✕ +

Use this area to setup branch specific settings for ACA Employee Qualified Groups

Branch	Admin Period	FTE Threshold	Day Insu...	Delay Initial...	Initial Meas...	Look Back	Stability	Stability St...	Measur...	Measur...	Surcharge	Surchar...
Memphis CA 90	29.00	1	<input type="checkbox"/>	<input type="checkbox"/>	10 Months	10 Months	10 Months	1/1/2015	10 Months	10/2/2014	4.00000000	

Add Branch Level Configuration:

To configure ACA setup for a specific branch click the *plus* sign to the right of configured branches.

The following window will display:

aca branch status

choose a branch to configure

Branch: Memphis NW

configurations

Transitional Period	6 Months	Delay Initial Measurement Period	<input type="checkbox"/>
Administrative Period	90	Initial Measurement Period	6 Months
Insurance Cutoff	1	Standard Measurement Period	6 Months
Stability Period	6 Months	Standard Measurement Period End Date	10/12/2014
Stability Period Start Date	1/1/2015	Approaching FT Threshold	28
Surcharge Enabled	<input checked="" type="checkbox"/>	Surcharge Rate	Amount F 10
Collect by Insurance Status	<input type="checkbox"/>		

0 ! ✕ Cancel Save

In the *branch* field, select the branch you would like to change the ACA settings for, then continue to make selections in the fields specific to the branch selected.

Click *Save*.

After you click *Save*, the branch specific setting will be displayed in the grid.

branch level configurations ✕ +

Use this area to setup branch specific settings for ACA Employee Qualified Groups

Branch	Admin Period	FTE Threshold	Day Insu...	Delay Initial...	Initial Meas...	Look Back	Stability	Stability St...	Measur...	Measur...	Surcharge	Surchar...
Memphis NE 59	29	29	1	<input checked="" type="checkbox"/>	11 Months	11 Months	11 Months	1/1/2015	11 Months	10/2/2014	2	

Deleting Branch Settings:

To delete a branch setting, click to highlight the branch in the grid then click the X to the right of the configured branches settings. Your branch settings will be removed.

Note If you make changes to your ACA settings in the future, existing employee calculations will remain with the previous settings until their re-evaluation period at which time the system will apply the new settings.

User Security Roles

To allow users to see employee ACA coding information you must have the ACA security roles associated with the appropriate secroles.

There are two security roles for ACA:

- ACA general user -
 - This user can see the employee ACA coding section in the employee/paysetup.
 - They can enter hire dates, ACA statuses and insurance statuses.
 - They **CANNOT** change the ACA hire date on the employee after it has been saved.
- ACA super user -
 - This user can see the employee ACA coding section in the employee/paysetup.
 - They can enter ACA hire dates, ACA statuses and insurance statuses.
 - They *can* change hire date on an employee after it has been saved.

If neither of the ACA security roles are setup for a TempWorks secrole, users associated with that secrole will be unable to see the ACA employee setup information.

Note By default the servicerep role will be assigned ACA general user and payclerk role will be assigned ACA super user. Please contact your TempWorks support team to verify the ACA secroles are configured to your requirements.

Adjustments

As part of the ACA insurance regulations, an employee can only be required to pay a certain percentage of their gross pay for their portion of the contribution to the insurance costs.

Note At the time of the writing of this documentation that percentage is 9.5%.

TempWorks has the ability to setup the employee adjustments and associate them with a corresponding employer adjustment. The system will use the insurance premium amount, the maximum percentage allowed for employee contribution and calculate the remainder as the employer contribution.

$Insurance\ Premium - (Employee\ Gross\ Pay * Adjustment\ \%) = Employer\ Contribution$

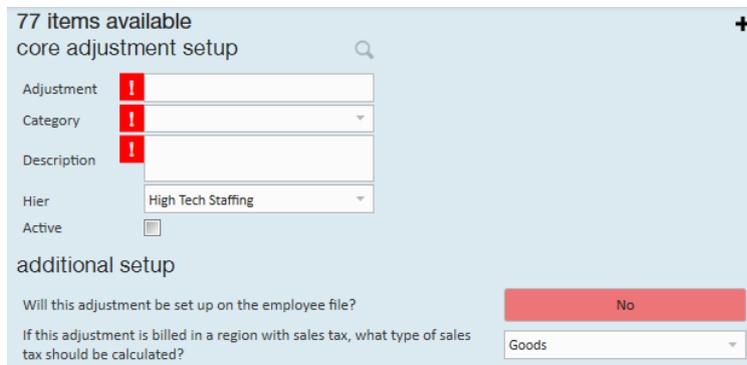
Set Up Employer Contribution Adjustments:

The first step in setting up your ACA insurance adjustments is to setup your employer contribution adjustments.

To set up the adjustment, click on all options/administration then in the menu on the left, click on adjustments.

Click the *plus* sign on the right side of the window.

The following window will display:



The screenshot shows a software window titled "77 items available" with a search icon and a plus sign in the top right corner. The window is divided into two main sections: "core adjustment setup" and "additional setup".

core adjustment setup

- Adjustment:** A text input field with a red exclamation mark icon to its left.
- Category:** A dropdown menu with a red exclamation mark icon to its left.
- Description:** A text input field with a red exclamation mark icon to its left.
- Hier:** A dropdown menu currently showing "High Tech Staffing".
- Active:** A checkbox that is currently unchecked.

additional setup

- Will this adjustment be set up on the employee file?:** A red button labeled "No".
- If this adjustment is billed in a region with sales tax, what type of sales tax should be calculated?:** A dropdown menu currently showing "Goods".

Complete the information in the following fields:

- *Adjustment* - Enter up to 10 characters to identify the adjustment.
- *Category* - Select the correct adjustment category from the list.
 - For employer portion adjustments you will need to select an adjustment category that is setup in your system as a benefit. The system will alert you when you save the adjustment if you have select employer portion for the adjustment but did not select a category that is set up as a benefit.

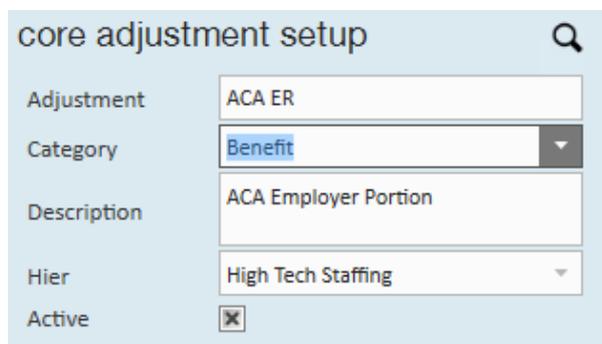
Note If you obtained new medical insurance for ACA compliance you may need to have an applicable category added to the adjustments category list.

- *Description* - Enter in a detailed description for the adjustment. You may enter up to 150 characters.
- *Hier* - Select the appropriate hierarchy for the adjustment.
 - Because the adjustments honor the hierarchy; you are able to set up adjustments in a way that will prohibit adjustments from being set up for employees in areas of your

hierarchy that do not have that particular adjustment available to them.

- Example: All of your employees are under one health insurance provider except your employee who work for your New Mexico branch. You may set up a different adjustment specific to the New Mexico health insurance provider and associate that adjustment to the New Mexico branch in your hierarchy.
- *Active* - Check the *Active* box to make the adjustment active in the system. If you need to deactivate the adjustment at a later date you may deselect the checkbox.

Following is an example of the setup for an employer portion medical adjustment for the core adjustment section of the window:



The screenshot shows a window titled "core adjustment setup" with a search icon in the top right corner. The window contains the following fields:

Adjustment	ACA ER
Category	Benefit
Description	ACA Employer Portion
Hier	High Tech Staffing
Active	<input checked="" type="checkbox"/>

After you select the *active* checkbox, you will need to complete the additional setup section of the window:

Additional Setup

- The first field in the additional setup section is *will this adjustment be setup on the employee file?* Click to display *Yes* in the answer field.

After selecting *Yes*, additional fields will display:

- Go to the last field labeled *if this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment.*
 - Select *employee premium, employer portion*. After selecting this option many fields will be removed.
- Complete the remainder of the fields based on which box on the W2 you would like the Adjustment to show in and what W2 label you would like.
- In the *what is the default frequency for this adjustment field* select from the dropdown field menu options.

Click the save button in the upper left:



In the example below, the adjustment is an employer portion adjustment for employees who are paid weekly and their insurance will be deducted with each weekly paycheck.

The screenshot shows a 'core adjustment setup' form with the following fields:

- Adjustment: ACA ER
- Category: Benefit
- Description: ACA Employer Portion
- Hier: High Tech Staffing
- Active:

Additional setup questions and answers:

- Will this adjustment be set up on the employee file? Yes
- If this adjustment should show on an employee's W2, what box should it be in? 12
- If this adjustment should show on an employee's W2, what should it be labeled? Health
- What is the default maximum that should be taken out over a year? (empty field)
- What is the default frequency for this adjustment? Weekly
- If this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment? Employee Premium - Employer Portion

Core Adjustment Setup:

The second step in setting up your ACA insurance adjustments is to setup your employee contribution adjustments.

To set up the employee contribution adjustment click on all options/administration then in the menu to the left click on adjustments.

Click the *plus* sign on the right to add the employee contribution.

The following window will display:

The screenshot shows a '76 items available core adjustment setup' form with the following fields:

- Adjustment: ACA EE
- Category: Cafeteria 125 plan
- Description: Health Insurance
- Hier: High Tech Staffing
- Active:

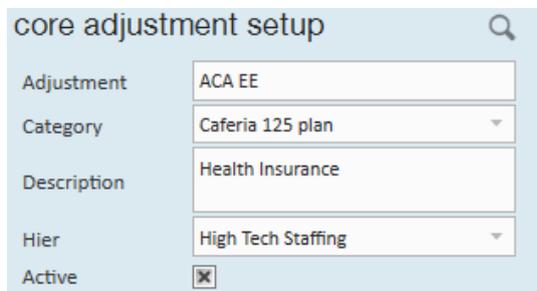
Complete the information in the following fields:

- Adjustment - Enter up to 10 characters to identify the adjustment.
- Category - Select the correct adjustment category from the list. If you obtained new medical insurance for ACA compliance, you may need to have an applicable category

added to the adjustment category list.

- Description - Enter a detailed description for the Adjustment. You may enter up to 150 characters.
- Hier - Select the appropriate hierarchy for the Adjustment.
 - Because the Adjustments honor the hierarchy, you are able to set up Adjustments in a way that will prohibit Adjustments from being setup for employees in areas of your hierarchy that do not have that particular Adjustment available to them.
 - Example: All of your employees are under one health insurance provider except your employee who work for your New Mexico branch. You may set up a different Adjustment specific to the New Mexico health insurance provider and associate that Adjustment to the New Mexico branch in your hierarchy.
- Active - Check the *Active* box to make the adjustment active in the system. If you need to deactivate the adjustment at a later date you may deselect the checkbox at that time.

Following is an example of the setup for an employee portion medical adjustment for the core adjustment section of the window:



The screenshot shows a window titled "core adjustment setup" with a search icon in the top right corner. The window contains the following fields:

Adjustment	ACA EE
Category	Caferia 125 plan
Description	Health Insurance
Hier	High Tech Staffing
Active	<input checked="" type="checkbox"/>

After you select the active checkbox, you will need to complete the additional setup section of the window.

Additional Setup:

The first field in the additional setup section is *will this adjustment be set up on the employee file?* After selecting yes, additional fields will display.

additional setup

Will this adjustment be set up on the employee file?	Yes
If this adjustment should show on an employee's W2, what box should it be in?	12
If this adjustment should show on an employee's W2, what should it be labeled?	Health
What is the default maximum that should be taken out over a year?	
What is the default frequency for this adjustment?	Weekly
If this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment?	Employee Premium - Employee Por
Is this ACA Adjustment calculating using a Federal Poverty Level Threshold amount?	Yes
What dollar amount of an employee's gross pay will be contributed to the employee portion of the insurance premium?	26.60
What is the total cost of this plan's health insurance per pay period?	\$50.26
Link this employee portion adjustment to the existing employer portion adjustment.	ACA ER

Go to the last field labeled *If this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment?* Select employee premium, employee portion.

After selecting this option some fields will be removed and some will be added:

- Enter in the W2 box and label information.
- If there is a default yearly maximum for the adjustment enter that amount in the *what is the default maximum that should be taken out over a year* field.
- In the *what is the default frequency for this adjustment* field, select the appropriate frequency for the adjustment.

Is this ACA adjustment calculated using a federal poverty level threshold amount?

If yes, you will be prompted for the flat amount which has been calculated.

<i>Is this ACA Adjustment calculating using a Federal Poverty Level Threshold amount?</i>	No
<i>What percentage of an employee's gross pay will be contributed to the employee portion of the insurance premium?</i>	9.50000000
<i>What is the total cost of this plan's health insurance per pay period?</i>	\$55.26
<i>Link this employee portion adjustment to the existing employer portion adjustment.</i>	ACA ER

If no, you will be prompted for the percentage, which, at the time of this writing is 9.5%:

In the *what percentage of an employee's gross pay will be contributed...* OR *what dollar amount of an employee's gross pay will be contributed...* field, enter the percentage or rate. For the percentage calculation, at the time of the writing of this documentation, the maximum allowable deduction is 9.5% of gross pay. The dollar amount, if using the federal poverty level threshold, needs to be calculated for the pay period amount.

In the *what is the total cost of this plan's health insurance per pay period* field, enter a dollar amount based on your per employee insurance premiums. For example, if you are setting up an adjustment for weekly pay frequency you will enter the weekly insurance cost.

If you pay weekly but your insurance premiums are quoted to you by your insurance company as a monthly premium, consult with your insurance provider for the weekly amounts to be deducted. Depending on the insurance provider, your premiums may be based on calendar month or may be based on a 4 week increment.

In the *link this employee portion adjustment to the existing employer portion adjustment* field select the corresponding employer portion you previously set up.

When done, click the *save* button in the upper left: 

In the example below the adjustment is an employee portion adjustment for employees who are paid weekly and their insurance will be deducted with each weekly paycheck.

Based on the setup examples above, when the Employee ACA adjustment is setup on an employee, TempWorks will look at the employees' gross pay, deduct the \$50 weekly insurance premium from their pay.

If however the employees earnings are low enough where \$50 represents more than 9.5% of their gross pay, the system will deduct 9.5% of their gross pay for the employee portion of the insurance premium and the remainder of the \$50 insurance premium will be placed under the Employer ACA adjustment.

additional setup	
Will this adjustment be set up on the employee file?	<input checked="" type="radio"/> Yes
If this adjustment should show on an employee's W2, what box should it be in?	<input type="text" value="14"/>
If this adjustment should show on an employee's W2, what should it be labeled?	<input type="text" value="Health"/>
What is the default maximum that should be taken out over a year?	<input type="text"/>
What is the default frequency for this adjustment?	<input type="text" value="Weekly"/>
If this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment?	<input type="text" value="Employee Premium - Employee Por"/>
Is this ACA Adjustment calculating using a Federal Poverty Level Threshold amount?	<input checked="" type="radio"/> No
What percentage of an employee's gross pay will be contributed to the employee portion of the insurance premium?	<input type="text" value="9.5000000"/>
What is the total cost of this plan's health insurance per pay period?	<input type="text" value="\$50.00"/>
Link this employee portion adjustment to the existing employer portion adjustment.	<input type="text" value="ACA ER"/>

Tip: An ACA report is available which will allow you to report on the ACA employer portion contributions. This report can be found in the reports sections of TempWorks titled *ACA Employee Adjustments*.

Note If your insurance provider has different premiums for different groups of employees (by age, different levels of plan, etc) you can either setup one adjustment for the insurance and then adjust the rates on a per employee basis, or you can set up one adjustment for each group of employee/premium combinations.

Note At the time of the writing of this document, the ACA regulations require that insurance be offered to employee dependents 25 years of age and younger. However, the employer does not need to contribute to the insurance premium regardless of the cost to the employee vs. their gross pay. You may also, as an employer, offer insurance to employee spouses but it is not required. For both cases you will want to have a separate adjustment code set up for dependent/spousal insurance. For the dependent/spousal adjustment code you will not associate it with an employer portion adjustment and therefore you will not incur any employer cost for this insurance offering.

Note if you are using a general ledger feed from TempWorks, you may need to adjust your general ledger account mapping to accommodate the new adjustments you are setting up for ACA insurance.

Note Additional adjustment scenario: If you are calculating a premium split but you still need to not deduct an amount over the 9.5% from the employee's gross wages.

Setting Up Employee Contribution Adjustments

For instance: The total of the premium per week may be \$70.00. You may want to share the cost with the employee where you each contribute \$35.00. In this scenario, the employee would be responsible for \$35.00. You would pay the additional \$35.00. However, if the \$35.00 employee portion is greater than the 9.5% maximum limit of the gross for the employee for a given week, the employee would be responsible for less than \$35.00.

Example:

Employee earns \$9.00/40hours = \$360.00
9.5% of employee gross wages = \$34.20

In this case the employee cannot be asked to contribute the additional \$.80

To handle this you will set up the employee adjustment and link it to the employer benefit adjustment as usual.

Using the example above, when setting up the employee adjustment, you will identify it as an ACA employee adjustment with a maximum of 9.5% with the total cost to the employee of \$35.00 and should be linked to the employer benefit adjustment.

This combination will track the employee's responsibility and, if the dollar amount exceeds the 9.5%, it will track the overage which you will need to pick up because this adjustment it is linked to the employer ACA benefit adjustment.

76 items available +

core adjustment setup 🔍

Adjustment	ACAESplit
Category	Caferia 125 plan
Description	Health Ins 50/50 Plan
Hier	High Tech Staffing
Active	<input checked="" type="checkbox"/>

additional setup

Will this adjustment be set up on the employee file?	<input checked="" type="button" value="Yes"/>
If this adjustment should show on an employee's W2, what box should it be in?	<input type="text"/>
If this adjustment should show on an employee's W2, what should it be labeled?	<input type="text"/>
What is the default maximum that should be taken out over a year?	<input type="text"/>
What is the default frequency for this adjustment?	Weekly
If this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment?	Employee Premium - Employee Por
Is this ACA Adjustment calculating using a Federal Poverty Level Threshold amount?	<input checked="" type="button" value="No"/>
What percentage of an employee's gross pay will be contributed to the employee portion of the insurance premium?	9.50000000
What is the total cost of this plan's health insurance per pay period?	\$35.00
Link this employee portion adjustment to the existing employer portion adjustment.	ACA ER

Note An additional benefit adjustment must be set up and added to the employee's record to track the employer's original benefit responsibility. This adjustment should NOT be linked to the ACA employer adjustment.

76 items available

core adjustment setup

Adjustment: ACAERSplit

Category: Benefit

Description: Health Insurance 50/50 Plan

Hier: High Tech Staffing

Active:

default rules

Amount: \$35.00

additional setup

Will this adjustment be set up on the employee file? Yes

Is this adjustment a federal tax levy? No

Does this adjustment require a linked authority? No

Should this adjustment collect for missed pay periods? Yes

Will this adjustment be used for a secondary direct deposit? No

If this adjustment should show on an employee's W2, what box should it be in? 14

If this adjustment should show on an employee's W2, what should it be labeled? Employer Medical

What is the default maximum that should be taken out over a year?

What is the default frequency for this adjustment? Weekly

If this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment?

Note When setting up the ACA insurance adjustment on the employee's record, the employee's portion and the additional benefit adjustment must both be set.

EINC	Adjustment	Description	Active	Sequence	YTD Total	Lifetime Total	MTD Total	WTD Total
0	ACAERSplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00
0	ACAESplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00

adjustment amounts

Deduct Greater Deduct Lesser

Amount: 9.50 % of Gross : Max of \$35.00

Main | Pay/Misc

Adjustment: ACAESplit

Description:

Active:

Frequency: Weekly

Start Date:

End Date:

Authority:

Case Number:

Note:

Sequence:

Date Served: 1/6/2015

Max Monthly: \$0.00

Max Yearly: \$0.00

Max Lifetime: \$0.00

Period Max: \$0.00

Min After Calc: \$0.00

EINC	Adjustment	Description	Active	Sequence	YTD Total	Lifetime Total	MTD Total	WTD Total
0	ACAERSplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00
0	ACAEEESplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00

adjustment amounts + ✎ ✕

Deduct Greater Deduct Lesser

Amount
\$35.00

Main		Pay/Misc	
Adjustment	ACAERSplit	Note	
Description		Sequence	
Active	<input checked="" type="checkbox"/>	Date Served	1/6/2015
Frequency	Weekly	Max Monthly	\$0.00
Start Date		Max Yearly	\$0.00
End Date		Max Lifetime	\$0.00
Authority		Period Max	\$35.00
Case Number		Min After Calc	\$0.00

Employee Record ACA Setup

Employee ACA set up is different for employees who work for you prior to the beginning of your first administrative period than it is for those who start working for you after the start of your first administrative period. Following is a general work flow for both groups of employees.

Note For employees hired or placed prior to October 2nd, the hire date will automatically set during the ACA initialization process. Please see section of this manual titled *ACA initialization process*.

Note All Employees will be reflected in the administrative period regardless of whether coverage is offered or not.

Workflow

Employees Hired Or Placed on Initial Assignment *Before* first Administrative Period:

<p>Full Time</p> <p>Step 1:</p>	<p>Part Time</p> <p>Step 1:</p>
---	---

At beginning of 2014 Administrative Period;
enter ACA Status of Full Time

At beginning of 2014 Administrative Period enter
ACA Status of Part time or Seasonal or
Variable.

Employee will now be tracked for hours worked
and is subject to be flagged as "Approaching
FTE" status

Step 2:

Employee enters into Administration Period
Change Insurance Status to "Offered"

Step 2:

Employee enters into Standard Measurement
Period

Step 3:

When employee accepts or declines
insurance change Insurance status

Step 3:

Standard Measurement Period Ends

If Accepted Set Up Employees ACA
Insurance Adjustments

Step 4:

Employee Enters Stability Period (*coverage can not be removed during this time*)

Employee begins a new Measurement Period

Employees Admin Status will automatically change to Measurement Period when insurance status is coded

Step 5:

Step 4:

Employee is re-evaluated

Step 5:

End of Stability Period Employee is re-evaluated.

If Full Time change ACA Status to Full Time and Employee moves to Step 2 of Full Time

If Full Time Employee; moves to Step 2 of Full Time

If Part Time Employee; moves to Step 2 of Part Time

If employee is not Full Time, Inactivate ACA Insurance Adjustments, change ACA status to Part Time/Seasonal or Variable and Employee moves to Step 2 of Part Time

Employees Hired Or Placed On Initial Assignment *After* First Administrative Period:

Full Time

Part Time

Step 1:

Step 1:

If employee is expected to be Full Time; upon the first assignment Enter Employee Hire Date and ACA Status of Full Time

If employee is expected to be Part Time, Season or Variable enter Employee Hire Date and ACA Status of Part time or Seasonal or Variable.

Employee will now be tracked for hours worked and is subject to be flagged as "Approaching FTE" status

Step 2:

Employee enters into Administration Period

Change Insurance Status to "Offered"

Step 3:

When employee accepts or declines insurance
change Insurance status

If Accepted Set Up Employees ACA Insurance
Adjustments

Step 4:

Employee Enters Stability Period (*coverage can
not be removed during this time*)

Step 2:

Employee enters into Standard Measurement
Period

Step 3:

Standard Measurement Period Ends

Step 4:

Employee is re-evaluated

Employee begins a new Measurement Period

Employees Admin Status will automatically change to Measurement Period when insurance status is coded

Step 5:

End of Stability Period Employee is re-evaluated.

If Full Time, Employee moves to Step 2 of Full Time

If employee is not Full Time, Inactivate ACA Insurance Adjustments, change ACA status to Part Time/Seasonal or Variable and Employee moves to Step 2 of Part Time

Step 5:

If Full Time change ACA Status to Full Time and Employee moves to Step t2 of Full Time

If Part Time Employee; moves to Step 2 of Part Time

Note The ACA status can be changed en-masse from the search result form:

5412	Abbott	sam	Memphis NE	(651) 845-4845	<input type="checkbox"/>	<input type="checkbox"/>
429497...	Abinteh	Mary	Memphis SE	(321) 456-8080	<input type="checkbox"/>	<input type="checkbox"/>
5021	Abootorabi	Deborah	Memphis NE	(651) 574-15...	<input type="checkbox"/>	<input type="checkbox"/>
13142	Abotina	Susie	Memphis NE		<input type="checkbox"/>	<input checked="" type="checkbox"/>
		Jill	Memphis NE	(651) 232-82...	<input type="checkbox"/>	<input type="checkbox"/>
		Jackie	Memphis NE		<input type="checkbox"/>	<input type="checkbox"/>
		Davis	Memphis SE	(651) 233-82...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		Davis	Memphis SE	(315) 222-3343	<input type="checkbox"/>	<input type="checkbox"/>
		Froehlich	Memphis SW	(651) 555-4782	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		Molly	Memphis SE	(858) 555-1002	<input type="checkbox"/>	<input type="checkbox"/>
		asdf;laksdf	Memphis SE		<input type="checkbox"/>	<input type="checkbox"/>
		Morgan	Memphis NE	(651) 235-82	<input type="checkbox"/>	<input type="checkbox"/>

- Messages
- Send Email
- Send Email to...
- Set As Order Candidate
- Preview Resume
- Change ACA Status**
- Add Selected to HotList
- Navigate to

update aca details

change status

Current Status: Full-Time (2) Part-Time (1) None (1)

New Status:

Comment:

This will affect 4 employee(s)

After an employee is coded with a hire date, an ACA status (full time, part time, seasonal or variable) and an insurance status, TempWorks will automatically calculated based on your system settings (the employee's admin status, insurance date and next evaluation date). It will also calculate the date the employee begins and ends their measurement period and, if applicable, their stability period.

Note After your TempWorks database has been initialized for ACA, if an Employee does not have an ACA hire date, an assignment warning will be activated when attempting to assign them to an order. If the employee was assigned prior to the initialization but they do not have an ACA hire date, a proofing error will be activated.

Employee Timeline Scenarios

Following are employee scenarios for the following:

- 60 Day administrative period

- January 1st insurance plan year
- 12 month transitional measurement period
- 12 month stability period
- 12 Month initial measurement period

Hire Date	Transitional Measurement Period	Hours Worked During Transitional Measurement Period	Insurance Coverage Offered	Standard or Initial (if hired as part time or variable hour) Measurement Period	Hour Worked During Standard Measurement Period	Insurance Coverage Offered
Before 11/1/13	11/1/13 - 10/31/14	>1560	1/1/15 - 12/31/15	11/1/14 - 10/31/15	>1560	1/1/16 - 12/31/16
Before 11/1/13	11/1/13 - 10/31/14	<1560	No coverage offered for 1/1/15 - 12/31/15	11/1/14 - 10/31/15	<1560	No coverage offered for 1/1/16 - 12/31/16
Hired 3/15/14 Considered Variable Hour	3/15/14 - 3/15/15	>1560	5/1/15 - 4/30/16	11/1/14 - 10/31/15	>1560	Through 12/31/16
3/15/14 Considered Full Time	NA	NA	1/1/15 - 12/31/15	11/1/14 - 10/31/15	>1560	1/1/16 - 12/31/16

3/15/14 Considered Part time	11/1/13 - 10/31/14	<1560	No coverage offered for 1/1/15 - 12/31/15	11/1/14 - 10/31/15	>1560	1/1/16 - 12/31/16
2/16/15 Considered Full time	NA	NA	5/1/15 - 12/31/15	11/1/14 - 10/31/15	>1560	1/1/16 - 12/31/16
4/15/15 Considered Variable Hour	NA	NA	No coverage offered for 5/1/15 - 6/30/16	4/12/15 - 4/12/16	>1560	7/1/16 - 7/1/17

Coding Employees:

To edit ACA Status:

Access an employee record.

From the employee's navigational tree select pay setup.

The Affordable Care Act section is in the lower right corner of the window.

If you are setting up a new Employee record, the ACA status field will default to hire date needed.

Hire date - When you click to set hire date, the following will display:

Note After your TempWorks database has been initialized for ACA, if an Employee does not have an ACA hire date, an assignment warning will be activated when attempting to assign them to an order. If the employee was assigned prior to the initialization but they do not have an ACA hire date, a proofing error will be activated.

In the *new status* field, select from the following ACA statuses:

Status
Full-Time
Part-Time
Variable
Seasonal

- *Full-Time*= Any employee whose scheduled hours qualify them as full-time status under the ACA regulations. As of the writing of this document the number of hours for full-time status is 30 or more in a week.
- *Part-Time* = Any employee whose scheduled hours are less than what qualifies them for full-time status under the ACA regulations. As of the writing of this document the number of hours for part-time status is any employee scheduled for less than 30 hours in a week.
- *Variable* = Any employee whose scheduled hours can not be reasonably determined at the time of hire.
- *Seasonal* = Any employee who is hired for a pre-determined period of time that is six months or less and that position typically takes place during the same part of the calendar year each year.
- *Hire date* - Select the date of hire based on your company's policy to determine hire date for employees.

Note After your TempWorks database has been initialized for ACA, if an employee does not have an ACA hire date, an assignment warning will be activated when attempting to assign them to an order. If the employee was assigned prior to the initialization but they do not have an ACA hire date, a proofing error will be activated.

Click *Save*.

Upon saving the *update employee details* window, the ACA status and hire date information will automatically fill in as follows:

- The *Last Eval Date* fills in with the current date.
- The *Next Eval* date will fill in based on your system settings for length of measurement period and stability period. *Next eval* date will be the start date of your next administrative period.

affordable care act		Details	Family +	Comments
ACA Status	Full-Time	<input checked="" type="checkbox"/> Admin Status	Administrative	
Hire Date	1/6/2015	Insurance Due	4/1/2015	
Last Eval	1/6/2015	Next Eval		
Insurance				

Note If an employee is set with a hire date and experiences an ACA defined break in service, their hire date will automatically be reset to require you to enter a new hire date when/if the employee is placed on assignment in the future. The new hire date will be used to calculate new employee ACA cycle dates.

After an employee is initially coded with an ACA Status, they will enter into the standard measurement period. At the end of the measurement period their ACA status is re-evaluated and if a change in status occurs based on the average hours worked during the measurement period you will need to update their ACA status.

To update the ACA status, click on the icon to the right of the *ACA status* field.

affordable care act	
ACA Status	Full-Time
<input checked="" type="checkbox"/> Admin Status	

The *update ACA details* window will display:

 update aca details

change status

Current Status Full-Time (1)

New Status 

Comment

This will affect 1 employee(s)

 Cancel Save

The current status will be indicated in the *current status* field.

Select the new status in the *new status* field.

Enter a comment, if desired, in the *comment* field.

Click *save*.

To Edit Hire Date:

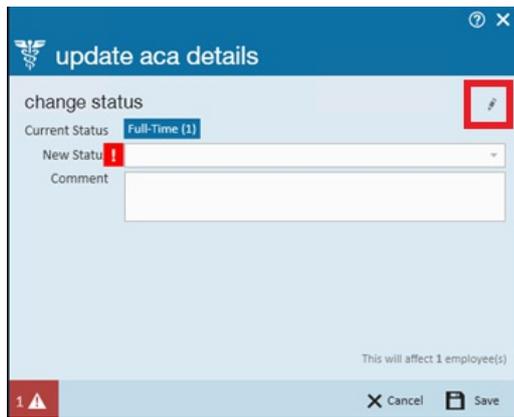
The ACA regulations state that once you have selected an ACA status for an employee you are committed to that status until the end of the employee's next measurement period at which time they are re-evaluated. To accommodate the regulation but still factor in a margin for human error, the TempWorks system allows for users who have a security role with ACA super user status to have the ability to edit the status. (See administrative section of this manual for more information - or if you are in the ACA Employee Article, please see the ACA Administration Article for more information).

ACA super users may click on the icon to the right of the ACA status.

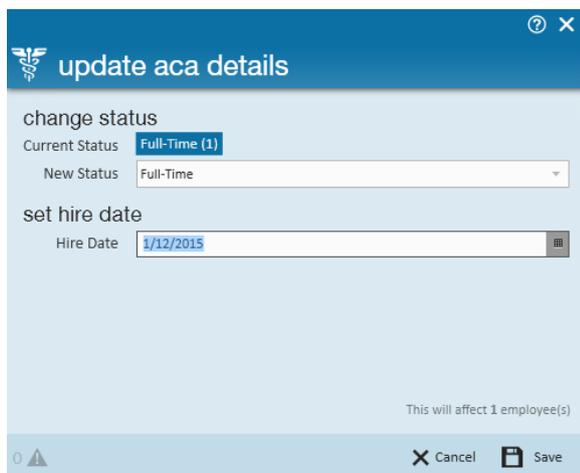
The *update ACA details* form will display:

The screenshot shows a web form titled "update aca details". The form is titled "change status" and includes a "Current Status" field with the value "Full-Time (1)". There is a "New Status" dropdown menu with a red warning icon to its left. Below the dropdown is a "Comment" text area. At the bottom right of the form, it says "This will affect 1 employee(s)". The footer contains a red warning icon with the number "1", a "Cancel" button, and a "Save" button.

Click the *pencil* icon on the right side of this form to edit the ACA hire date:



A new section will display on the window titled *set hire date* with a field labeled *hire date*:



In the *change status* section select the *status*.

Note If there is no change in ACA status and you are simply updating the *hire date* field you will still need to select an ACA status.

In the *hire date* field select the correct hire date.

Click *save*.

The ACA hire status can be changed en-mass by searching for all employees who need their status updated.

Right click and select *change ACA status*:

ID	Last Name	First Name	Branch
429497...	Accrue	Jackie	Memphis NE
16438	Alaska	Joe	Memphis SE
429501...	Allistr...		Memphis NW
12189	Baile		Memphis SE
429500...	Boett		Memphis SE
429501...	Five		Memphis NW
429501...	Short		Memphis NE
429500...	Zarn		Memphis SE

This will display the number in each of employees in each of the different ACA hire statuses:

Select the new ACA hire status and click *save*. All highlighted employees will be updated.

Note By resetting the status using the mass update, you will be resetting all ACA coding information for the employee, including any existing insurance offered statuses.

Note The status can only be modified if the employee is in an administrative period.

Editing Family Insurance Status:

You may also enter insurance status from the Affordable Care Act section of the employee pay setup window.

In the *insurance* field select from the following options:

Offer
Accepted
Not Eligible
Not Offered
Offered
Declined
COBRA Offered
COBRA Declined
COBRA Accepted

Depending on which selection you make, you will be prompted to enter more information:

Selecting **accepted** will give you the opportunity to enter a *date offered* and an *effective date of the insurance*.

Note After selecting an insurance status of *accepted*, upon saving the employee record changes the adjustment setup wizard will automatically display to remind and guide the user through the insurance adjustment setup process.

Insurance	Accepted
Date Offered	1/12/2015
Effective Date of Insurance	2/1/2015

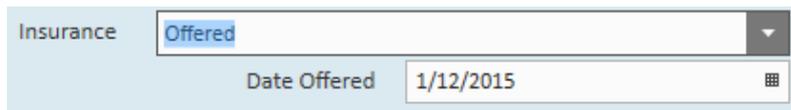
Selecting **not eligible** will not produce additional fields. However, by selecting this status the employee will NOT be factored in the automatic calculations the system conducts to determine what percentage of eligible employees have not been offered insurance. This coding and calculation is important as ACA regulations mandate that a certain percentage of eligible employees be offered insurance or your company could be subject to fines. At the writing of this document that percentage is 70% for the year 2015, 95% for subsequent years.

Insurance	Not Eligible
-----------	--------------

Selecting **not offered** will not produce additional fields. However, by selecting this status the employee WILL be factored in the automatic calculations the system conducts to determine what percentage of eligible employees have not been offered insurance. This coding and calculation is important as ACA regulations mandate that a certain percentage of eligible employees be offered insurance or your company could be subject to fines. At the writing of this document that percentage is 70% for the year 2015, 95% for subsequent years.

Insurance	Not Offered
-----------	-------------

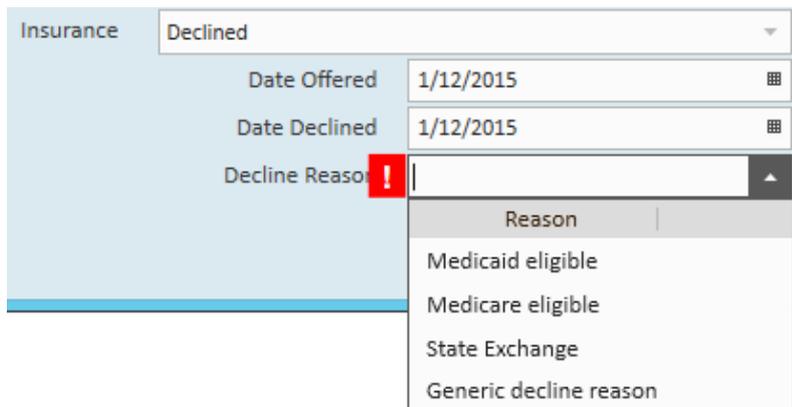
Selecting **offered** will give you the opportunity to enter a *date offered*. The date offered will default to the current date. The employee with an insurance status of *offered* WILL be factored into the automatic calculations for percentage of eligible employees who have been offered insurance. However, their status is different from *accepted* or *declined*. This status is used in the time period that exists between the time the employee is offered insurance and the time they decide to accept or decline insurance.



The screenshot shows a form with a label 'Insurance' and a dropdown menu set to 'Offered'. Below it, there is a 'Date Offered' field with the value '1/12/2015'.

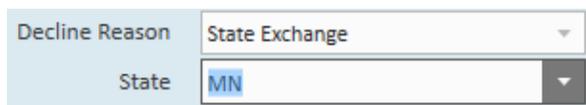
Selecting **declined** will give you the opportunity to enter a *date offered*, a *date declined* as well as a *declined reason*. The employee with an insurance status of declined will be factored into the automatic calculations for percentage of eligible employees who have been offered insurance.

You will select from the following list of *decline reason* options.



The screenshot shows a form with a label 'Insurance' and a dropdown menu set to 'Declined'. Below it, there are two date fields: 'Date Offered' and 'Date Declined', both set to '1/12/2015'. Below the dates is a 'Decline Reason' dropdown menu with a red exclamation mark icon. The dropdown menu is open, showing the following options: 'Reason', 'Medicaid eligible', 'Medicare eligible', 'State Exchange', and 'Generic decline reason'.

If *state exchange* is selected as a *decline reason* you will be given the opportunity to enter the state in which the employee has enrolled in the state exchange.



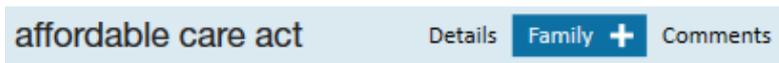
The screenshot shows a form with a label 'Decline Reason' and a dropdown menu set to 'State Exchange'. Below it, there is a 'State' field with the value 'MN'.

After the insurance information has been entered, click save in the upper left of the window.

Coding Family Coverage

You may enter family coverage offered in the employee Affordable Care Act section.

Next to the *details* option on the employee/pay setup form, click the *family* option.



To add family insurance information, click the *plus* button to the right of *family*.

The following window will display:

Enter the Following Information:

- Full name - Enter the full name of the family member.
- Relation - Select either spouse or dependent from the selection list.
 - Note that it is very important that the correct selection is made. ACA requires that insurance be offered for any dependents 25 years or younger, but spousal coverage is not required to be offered.
- SSN - Enter the dependent's SSN.
- Birth date - Enter the dependent's date of birth.
- Enrolled - Click to highlight the correct enrollment status of yes or no.
 - If yes is highlighted you will be prompted to enter an enrollment date.
 - If no is highlighted you will be prompted to enter a decline date.

Click *save*.

Repeat for each dependent and spouse who was offered insurance under your plan.

Editing Family Insurance Status:

After returning to the employee Affordable Care Act section the family insurance information will be displayed and can be viewed at any time by clicking on the *family* option.



The screenshot shows a navigation bar with 'affordable care act' on the left and 'Details', 'Family +', and 'Comments' on the right. Below the navigation bar, there is a list of family members:

Jennifer Becket	Dependant
● Enrolled on 1/12/2015	
Jane Becket	Spouse
● Declined enrollment on 1/12/2015	

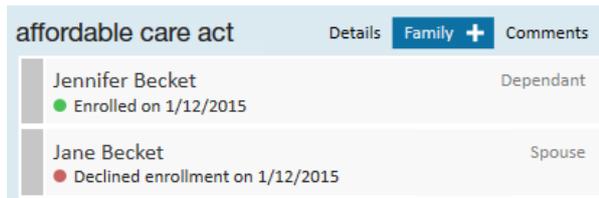
To edit a family insurance status, access the Affordable Care Act section under employee/pay setup.



The screenshot shows the same navigation bar as the previous image, but the 'Family +' option is highlighted in blue.

Click the *family* option.

The family details will be displayed.

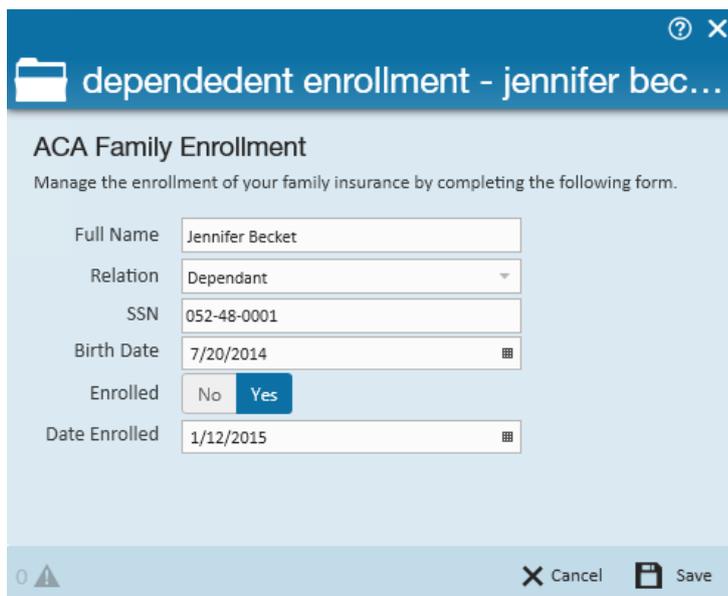


The screenshot shows the same navigation bar as the previous images, but the 'Family +' option is now selected and highlighted in blue. The family details are displayed below:

Jennifer Becket	Dependant
● Enrolled on 1/12/2015	
Jane Becket	Spouse
● Declined enrollment on 1/12/2015	

Double click on the item you wish to edit.

The *dependent enrollment* window will display:



The screenshot shows a window titled 'dependent enrollment - jennifer bec...'. The window contains the following information:

ACA Family Enrollment
Manage the enrollment of your family insurance by completing the following form.

Full Name	Jennifer Becket
Relation	Dependant
SSN	052-48-0001
Birth Date	7/20/2014
Enrolled	<input type="radio"/> No <input checked="" type="radio"/> Yes
Date Enrolled	1/12/2015

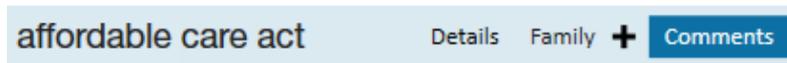
At the bottom of the window, there are 'Cancel' and 'Save' buttons.

Make any necessary changes then click *save*.

Comments Section:

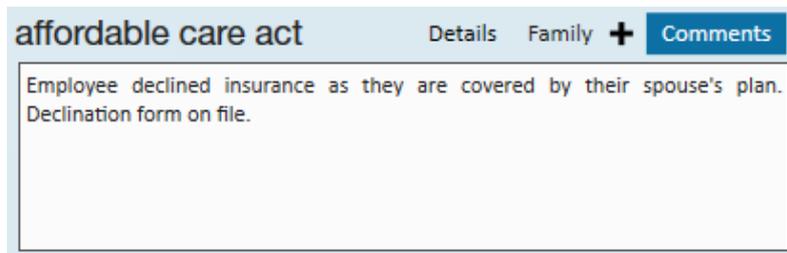
You may use the *comments section* to enter any applicable ACA comments.

To add ACA comments to the employee ACA setup, access the Affordable Care Act section under employee/pay setup:



Click the *comment* option.

The following window will display:



Enter the necessary comments then click the *save* button in the upper left corner.

ACA Insurance Adjustments

During the process of employee ACA coding, you are given the opportunity to choose the insurance status. This status can be changed as the employee is moved through the insurance enrollment process.

For example; the employee may be offered the insurance but immediately upon that offer they neither accept nor decline the insurance and are given a period time to make a decision. In this scenario the employee's ACA insurance status would be set to *offered* with an *offered date* recorded.

At the point the employee makes a decision to accept the insurance, their ACA insurance status will be edited to reflect *accepted*:

affordable care act		Details	Family +	Comments
ACA Status	Variable	<input checked="" type="checkbox"/> Admin Status	Administrative	
Hire Date	9/24/2014	Insurance Due	12/1/2014	
Last Eval	9/24/2014	Next Eval		
Insurance	Accepted			
	Date Offered	1/12/2015		
	Effective Date of Insurance	2/16/2015		

After changing the ACA insurance status to *accepted*, and upon saving the employee record changes, the adjustment setup wizard will display to remind and guide the user through the ACA adjustment setup process.

Setting Up Employee Insurance Adjustments:

After clicking *save* from the employee record the add adjustment wizard window will display:

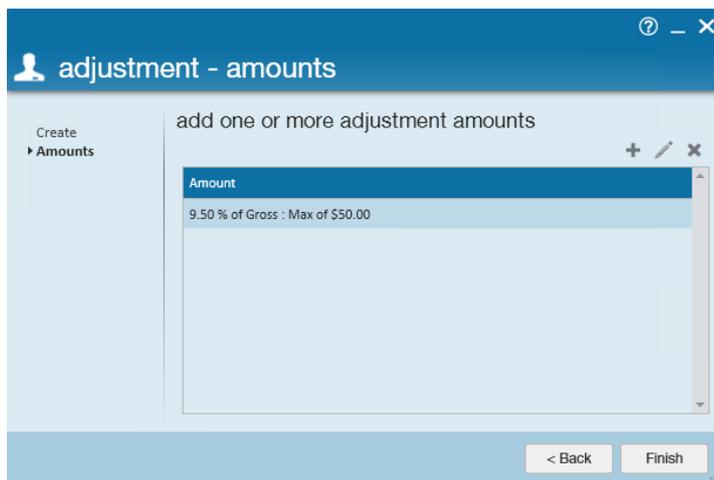
Complete the following fields:

- *Adjustment* - Select the appropriate employee portion adjustment your administrator has set up for ACA insurance.
 - Only adjustments that were set up in administration as ACA related adjustments will appear in this selection list.
- *Description* - Enter a description, if desired.
- *Active* - the active box will default to be checked indicating the adjustment is active.
- *Frequency* - the frequency field will default to the frequency that was set for this adjustment when the adjustment was set up in administration.
- *Start date* - If you are delaying the start date of the insurance, you may enter the date the adjustment will start.

- The adjustment will be deducted from the employee's check if the start date falls within the date range of the weekend date of the paycheck.
- Leaving the start date blank will cause the adjustment to be deducted on the next paycheck processed for the employee.
- **End date** - This is the date the adjustment will stop being deducted on the employee's paycheck.
 - Generally, you will not be entering an end date for an ACA insurance adjustment at the time you are setting it up but can come back later if and when the insurance should stop being deducted.

Click next.

The *adjustment amounts* window will display:



The percentage amount and the insurance premium amount will default based on what your administrator setup in administration. If you would like to edit those amounts click the *pencil* in the upper right corner.

The adjustment rule window will display.

Make any changes to the *deduction amount* or *maximum deduction* then click *save*.

Note Your administrator, during set up of the adjustment, associated the employee insurance adjustment to the corresponding employer adjustment. There is no need to set up a separate adjustment for the employee portion on the employee record.

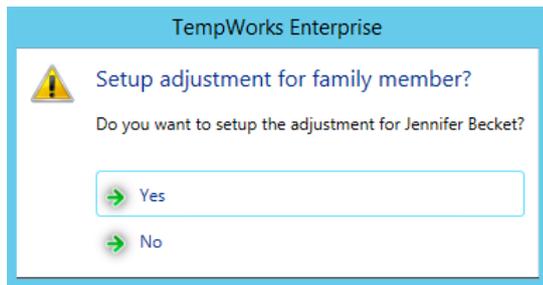
TempWorks Enterprise will automatically calculate the employer portion based on the settings in the employee adjustment and the employee's gross pay.

Note for an ACA employee insurance adjustment that is linked to an employer adjustment do NOT check the box next to *only apply this rule if all of the adjustment can be deducted*.

After clicking *save* you will be returned to the adjustment amount window.

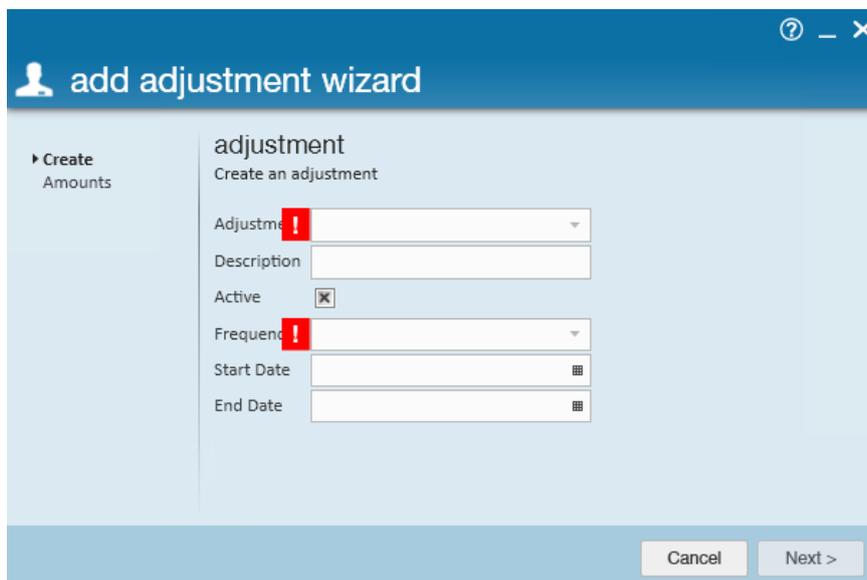
Click *finish*.

If the employee also has dependent insurance with a status of *enrolled* the following window will display:



Clicking *no* will return you to the employee pay setup window.

Clicking *yes* will prompt you to set up an additional adjustment through the *add adjustment* wizard.



Select the adjustment that was created in administration for dependent insurance and continue with the adjustment set up.

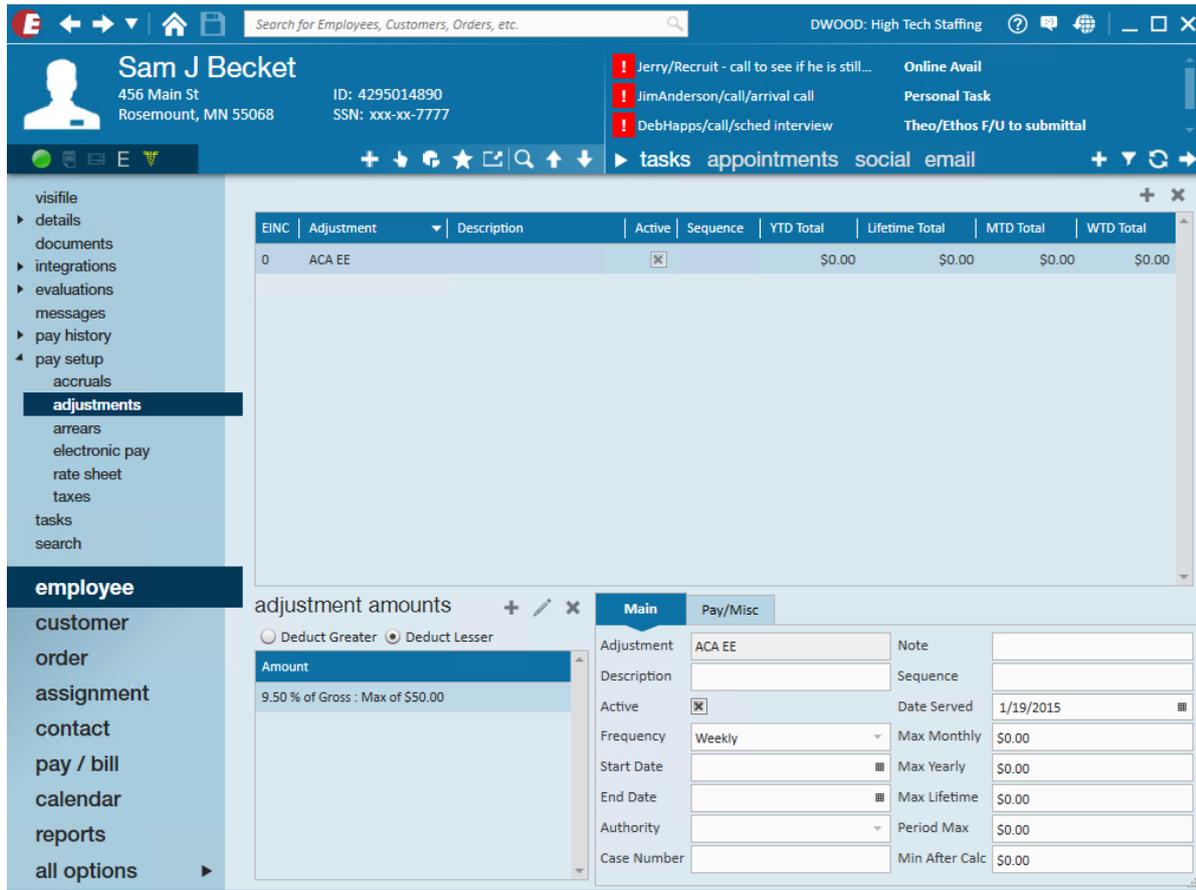
Note The adjustment selection for dependent insurance will not have a corresponding employer portion and the employee will be responsible for paying the full insurance premium regardless of their earnings. If your company voluntarily offers an employer contribution for the dependent and spousal insurance, your administrator will have set up these benefit adjustments accordingly.

After setup of the adjustments is completed, you will be returned to the employee pay setup window and all changes will have been saved.

Viewing Adjustments

To view employee adjustments select pay setup/adjustments from the employee record.

The following window will display:



All adjustments set up for an employee will be displayed in this window.

Additional adjustment scenario:

If you are calculating a premium split or the federal poverty level but you still need to not deduct an amount over the 9.5% from the employee's gross wages.

For instance: The total of the premium per week may be \$70.00 You may want to share the cost with the employee where you each contribute \$35.00. In this scenario, the employee would be responsible for \$35.00. You would pay the additional \$35.00. However, if the \$35.00 employee portion is greater than the 9.5% maximum limit of the gross for the employee for a given week, the employee would be responsible for less than \$35.00.

Example: Employee earns \$9.00/40hours = \$360.00
 9.5% of employee gross wages = \$34.20

In this case the employee cannot be asked to contribute the additional \$.80

To handle this you will set up the employee adjustment and link it to the employer benefit adjustment as usual.

Using the example above, when setting up the employee adjustment, you will identify it as an ACA employee adjustment with a maximum of 9.5% with the total cost to the employee of \$35.00 and should be linked to the employer benefit adjustment.

This combination will track the employee's responsibility and, if the dollar amount exceeds the 9.5%, it will track the overage which you will need to pick up because this adjustment it is linked to the employer ACA benefit adjustment.

The image shows a screenshot of a software interface for setting up an adjustment. It is divided into two main sections: 'core adjustment setup' and 'additional setup'.

core adjustment setup

- Adjustment: ACAEESplit
- Category: Cafeteria 125 plan
- Description: Health Ins 50/50 Plan
- Hier: High Tech Staffing
- Active:

additional setup

- Will this adjustment be set up on the employee file? Yes
- If this adjustment should show on an employee's W2, what box should it be in?
- If this adjustment should show on an employee's W2, what should it be labeled?
- What is the default maximum that should be taken out over a year?
- What is the default frequency for this adjustment? Weekly
- If this adjustment provides affordable healthcare coverage in compliance with ACA, which option best describes this adjustment? Employee Premium - Employee Por
- Is this ACA Adjustment calculating using a Federal Poverty Level Threshold amount? No
- What percentage of an employee's gross pay will be contributed to the employee portion of the insurance premium? 9.50
- What is the total cost of this plan's health insurance per pay period? \$35.00
- Link this employee portion adjustment to the existing employer portion adjustment. ACA ER

Note An additional benefit adjustment must be set up and added to the employee's record to track the employer's original benefit responsibility. This adjustment should NOT be linked to the ACA employer adjustment.

When setting up the ACA insurance adjustments on the employee's record, the employee's portion of the additional benefit adjustment must both be set.

EINC	Adjustment	Description	Active	Sequence	YTD Total	Lifetime Total	MTD Total	WTD Total
0	ACAERSplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00
0	ACAEEsplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00

adjustment amounts + ✎ ✕

Deduct Greater Deduct Lesser

Main		Pay/Misc	
Adjustment	ACAEEsplit	Note	
Description		Sequence	
Active	<input checked="" type="checkbox"/>	Date Served	1/6/2015
Frequency	Weekly	Max Monthly	\$0.00
Start Date		Max Yearly	\$0.00
End Date		Max Lifetime	\$0.00
Authority		Period Max	\$0.00
Case Number		Min After Calc	\$0.00

Amount: 9.50 % of Gross : Max of \$35.00

EINC	Adjustment	Description	Active	Sequence	YTD Total	Lifetime Total	MTD Total	WTD Total
0	ACAERSplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00
0	ACAEEsplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00

adjustment amounts + ✎ ✕

Deduct Greater Deduct Lesser

Main		Pay/Misc	
Adjustment	ACAERSplit	Note	
Description		Sequence	
Active	<input checked="" type="checkbox"/>	Date Served	1/6/2015
Frequency	Weekly	Max Monthly	\$0.00
Start Date		Max Yearly	\$0.00
End Date		Max Lifetime	\$0.00
Authority		Period Max	\$35.00
Case Number		Min After Calc	\$0.00

Amount: \$35.00

Inactivating Adjustments

If an employee is no longer eligible for your insurance or chooses to cancel their insurance you will want to inactivate their ACA insurance adjustment code(s).

To inactivate an adjustment access the employee record. In the left hand menu select pay setup/adjustments.

The following window will display: Click to highlight the adjustment you would like to inactivate.

EINC	Adjustment	Description	Active	Sequence	YTD Total	Lifetime Total	MTD Total	WTD Total
0	ACAERSplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00
0	ACAEEESplit		<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00

adjustment amounts + ✎ ✕

Deduct Greater Deduct Lesser

Main		Pay/Misc	
Adjustment	ACAERSplit	Note	
Description		Sequence	
Active	<input checked="" type="checkbox"/>	Date Served	1/6/2015
Frequency	Weekly	Max Monthly	\$0.00
Start Date		Max Yearly	\$0.00
End Date		Max Lifetime	\$0.00
Authority		Period Max	\$35.00
Case Number		Min After Calc	\$0.00

In the lower portion of the window on the *main* tab there is an *active* field with a check box.

Click to deselect the check box.

Click the *save* button in the upper left corner of the window.

For complete documentation on all the features of the adjustment window please refer to the [How to Setup Garnishments](#) article.

Employee ACA Avatar Icon:

An icon is available in the employee record avatar area specifically for ACA.

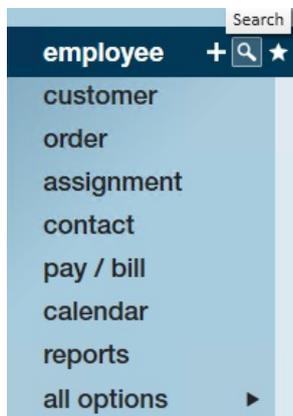


The following icon statuses will potentially be displayed in the employee avatar Icon area:

- In measuring - No action needed until the end of the current measurement period. The icon will be displayed in **GREEN**.
- In administrative period - Please review the employee's work history to determine their ACA status for the next stability period. The icon will be displayed in **YELLOW**.
- Insurance overdue - You are past the employer mandated amount of time allowed to review the ACA status of this employee. The icon will be displayed in **RED**, as shown.
- Nothing - The employee is not in any periods and does not have an ACA status. A review of this file is suggested. The icon will be displayed in **WHITE**.
- Break in service - The employee has had a break in service. It is suggested that the file is reviewed to ensure insurance has been suspended. The icon will be displayed in **GRAY**.

Employee ACA Enhanced Search:

The ACA data is searchable in the employee enhanced search area. For complete details and functionality regarding Enhanced Searches please refer to the [TempWorks Searching Article](#).



To access the enhanced search area click on the *magnifying glass* icon next to employee in the navigational tree.

Click on the *enhanced search* option.

Note you may want to click the *clear criteria* button in the upper right section of the window before creating an enhanced search.

There are two categories of ACA search criteria: *ACA* and *ACA statistics*.

The following are the search options in the *ACA* category:

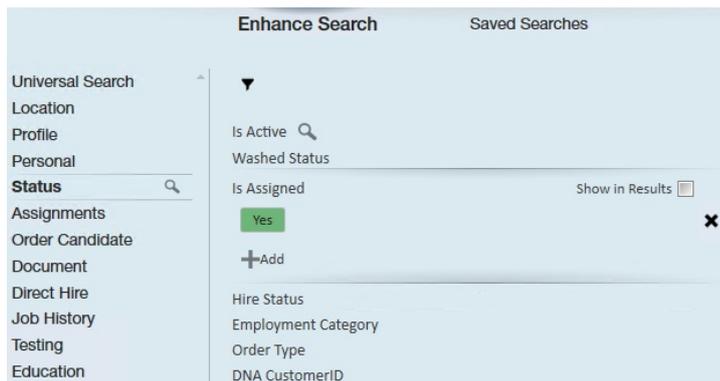
- Is Eligible
- ACA Status
- Offer Response
- Admin Period Status
- Declined Reason
- Insurance Deadline
- Effective Insurance Date
- Declined Date
- Date Offered
- Last Evaluation Date
- Hire Date
- Admin Period Start Date
- State Exchange
- Notes

The following are the search options in the *ACA statistics* category:

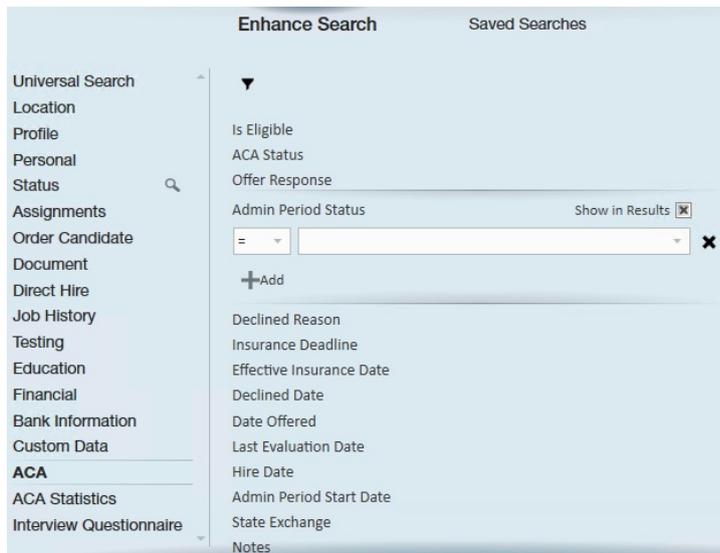
- Average Hours Per Week
- FTE Status

You may search using any combination of ACA criteria as well as criteria from any other category.

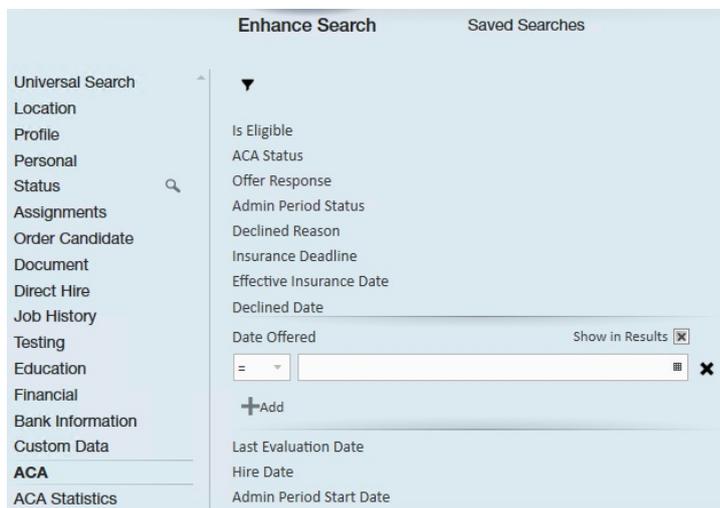
The following is an example of a common and useful ACA search to allow you to pull a list of employees who are currently assigned and view their administrative period status as well as their insurance offered status.



Employee Status/Is Assigned/Yes



ACA/admin period status/show in results



ACA/date offered/show in results

Click the *search* button, your results will be displayed.

Note Employees who are not being offered coverage will be reflected in the administrative period.

Click and drag the column heading for *admin period status* and drop it in the blank space above the column headings. By doing this you will be grouping your list by the administrative period status.

You may click drag and drop the column headings horizontally to move the *admin period status* and *date offered* columns closer to the left for easier viewing.

Following is a sample of what the search results would look like:

Enhance Search Saved Searches

Your search returned 348 results.

Admin Period Status

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Phone	Admin Period Status	Date Offered
429500...	Omalley	George	CardiffUK	(455) 854-5545	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	55330	<input type="checkbox"/>		Administrative	
429501...	Schwarze	Thomas	Canada 2	(608) 666-6666	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Payroll Inquiry	53714	<input type="checkbox"/>	(608) 666-5555	Administrative	
429500...	Spyke	Patrick	Memphis SE	(517) 651-3547	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...	48823	<input type="checkbox"/>		Administrative	
429497...	Thresher	Cameron	Memphis NE	(546) 321-5845	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...	55121	<input type="checkbox"/>		Administrative	
429497...	Zipper	Jessica	Memphis SE	(604) 564-5110	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Absent (Personal)	90125	<input checked="" type="checkbox"/>	(654) 231-4578	Administrative	
Admin Period Status: Measurement (3 items)												
16438	Alaska	Joe	Memphis SE	(612) 555-0919	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMVM	45056	<input checked="" type="checkbox"/>	(612) 555-1234	Measurement	
12189	Bailey	Brian	Memphis SE	(651) 580-0580 x123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	45202	<input type="checkbox"/>	(651) 582-05...	Measurement	
429500...	Boetticher	Gale	Memphis SE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	55107	<input checked="" type="checkbox"/>		Measurement	
Admin Period Status: Break in Service (3 items)												
429501...	Anderson	James	Memphis N...	(651) 480-2192	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Assignment Chan...	55033	<input checked="" type="checkbox"/>		Break in Service	
429501...	Jones	Bridget	Memphis SW	(515) 555-5555	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	54455	<input type="checkbox"/>	(515) 666-6666	Break in Service	
429501...	Stalone	Sylvester	Canada 2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	55124	<input type="checkbox"/>	515654321	Break in Service	
Admin Period Status: Overdue (1 item)												
5052	Becket	Sam	Memphis NE	(651) 248-8248 x123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	WCandidate	55068	<input type="checkbox"/>		Overdue	1/12/2015 12:00:...

ACA and Pay Codes:

Pay codes are can can be configured to flag Enterprise to count towards ACA calculated hours. Standard Enterprise pay codes of Hol, Reg, Vac1, Vac2, ELECT, Sick, UnbillOT, and Auto OT are flagged as ACA Hours pay codes.

If you have customized your pay codes or would like to flag additional standard pay codes to count toward ACA calculated hours you may do so by contacting the TempWorks support department. They will also be able to send you a list of your current pay codes.

Employees on Special Leave of Absence:

Employees who are on an ACA special leave of absence such as FMLA, jury duty and military service are not considered as having a break in service for purposes of ACA. The system calculations that are used to determine breaks in service are based on the hours worked and periods of time when hours are not worked.

To ensure employees on an ACA special leave of absence do not get flagged with a break in service, a timecard will need to be processed each pay period using a pay code that is setup to count ACA hours but not count as hours worked.

If you have a situation of special leave of absence you will need to have a pay code setup that is flagged as ACA hours but not hours worked. You may have this configured either as a generic protected leave of absence pay code or you may have one configured for each specific scenario IE: FMLA, military service, etc.Each pay period you will process a timecard for the employee

using this pay code with their standard number of hours per pay period. Depending on your systems settings, hours may not calculate for a \$0 check and you may need process a 1 cent transaction.

Customer/Department/Order Specific Surcharges

The ACA surcharge is a percentage of billings that you may choose to add to a customer's invoice in an attempt to re-coup some of your ACA insurance expenses.

In the administration section, your administrator can select to activate ACA surcharges for invoicing. Additionally, the administrator may setup a default system or branch wide surcharge percentage. If your system was setup this way all customers will have that percentage of billings added to their invoice as an ACA surcharge.

You have an opportunity on an individual customer/department and order basis to modify the percentage specific to that customer/department/order. If the majority of your customers will not be charged this surcharge your company may want to enable the surcharge and enter 0 as the percentage amount in the system or branch administration settings, then for the customers you will be billing this surcharge to; you may enter the actual percentage on the customer/department record.

Adversely, if the majority of your customers will be subject to this surcharge your company may want to enable the surcharge, enter your company's standard percentage in the system/branch wide settings in administration, and for any customers you do not wish to apply this surcharge to you may change the percentage to 0.

Note You may have your system configured to only have the ACA surcharge calculated on employees with specific ACA insurance statuses.

For example: you may want to only charge the surcharge on employees who have accepted the insurance. By default, the surcharge will be charged on all employees on the invoice. If you would like to specify insurance statuses for the surcharge, those can be set at the entity, branch, customer, department and order level.

Adding a Customer Specific Surcharge:

To add a customer specific ACA surcharge, access the customer record then navigate to the invoice setup/adjustments area. The ACA surcharge setup is at the top of this form:

aca surcharge

A \$0.25 per hour surcharge is active. This has been setup on High Tech Staffing.

Override Settings

The system or branch level settings will be displayed. To override the system or branch level settings click to put a checkmark in *override settings* check box.

aca surcharge

ACA Surcharge will not be calculated.

Override Settings

Apply to Departments

Surcharge Enabled

By overriding the ACA settings an ACA surcharge will not be calculated for this customer. If you would like to filter down to the departments of this customer click to place an x in the *apply to departments* field.

Note If apply to department is selected, TempWorks will apply the surcharge to all existing departments as well as any new departments added after the surcharge is set up.

To apply a different ACA surcharge to this customer (and/ or its departments) click to place an x in the *surcharge enabled* field:

aca surcharge

Override Settings

Apply to Departments

Surcharge Enabled

Surcharge Type and Rate

Advanced Settings

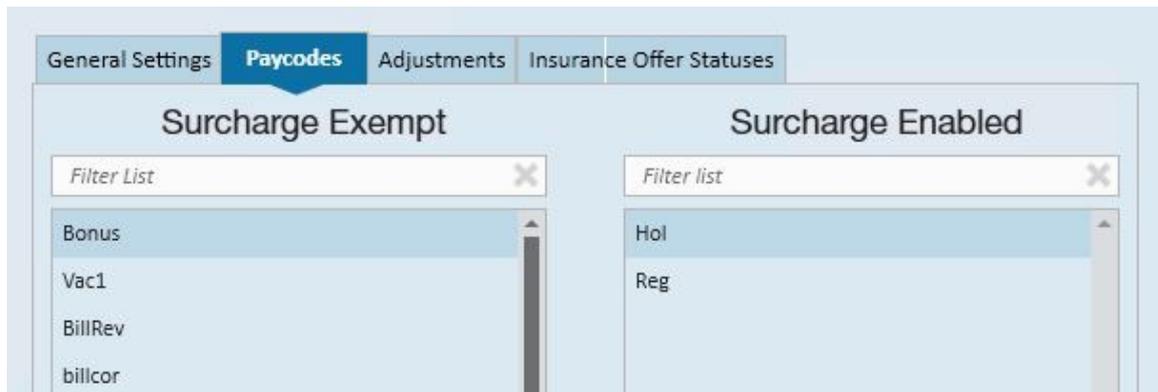
- In the *surcharge type and rate* field select the basis for the surcharge; percentage of payroll cost, amount per hour, flat rate per aldent or Percentage of Invoice.
- If you select percentage of payroll cost, the surcharge will be calculated based on the percentage of the cost of the payroll.
- If you select amount per hour, this is the amount per hour billed (based on the ACA advanced settings selected) that will be added to your customer's invoices.
- If you select flat rate per aldent, the amount billed will be per employee being billed.
- If you selected percentage of invoice, this is the percentage of the billings (based on the ACA offer statuses selected) that will be add to your customer's invoices.

Note you will have the opportunity on each individual order to modify the amount or percentage specific to that order.

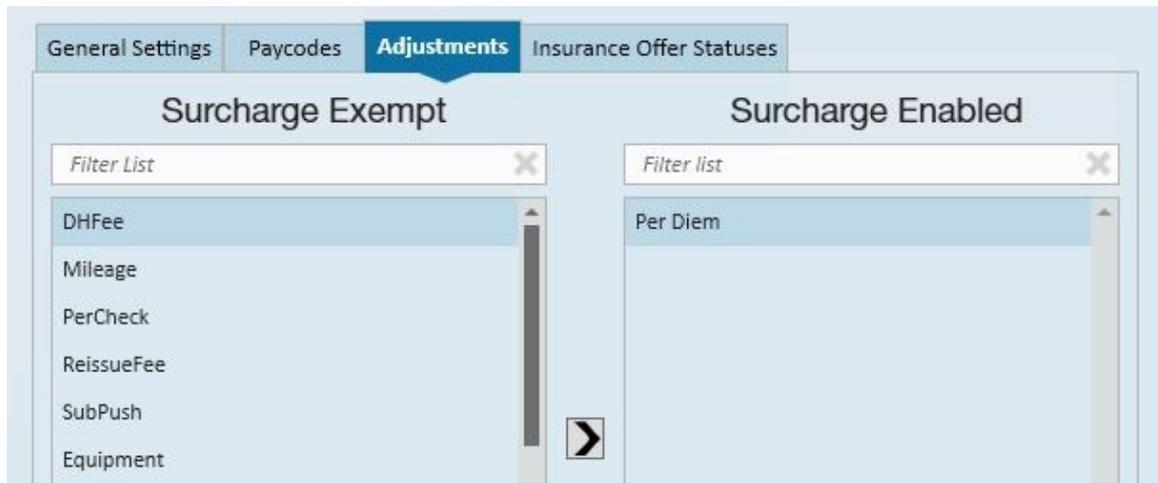
Click to select *advanced settings* if surcharges are going to be billed to help offset the cost of ACA insurance, and you want to also determine what hours, paycodes, adjustments, and offer statuses will be used to determine the surcharge amount.

Setting	Value
Calculate on Regular Hours	Yes
Calculate on Overtime Hours	Yes
Calculate on Doubletime Hours	Yes
Calculate on Salary	Yes
Calculate on Units	Yes
Calculate on Discounted Portion of Invoice	Yes

General settings: Select each type of hours/pay that should be used in calculating the surcharge.



Paycodes: Select the paycodes that should be used in calculating the surcharge.



Adjustments: Select the adjustment codes that should be used in calculating the surcharge.

Insurance offer statuses: Select the insurance offer statuses that should be used in calculating the surcharge.

Note to select the options in the paycodes, adjustments, and insurance offer status forms click to select the options desired on the left (exempt) then click the right facing arrow to move the option to the enabled (right) side.

Note for insurance offer status only, if you would like to extend the surcharge based on status, make sure the yes/no toggle to set to yes.

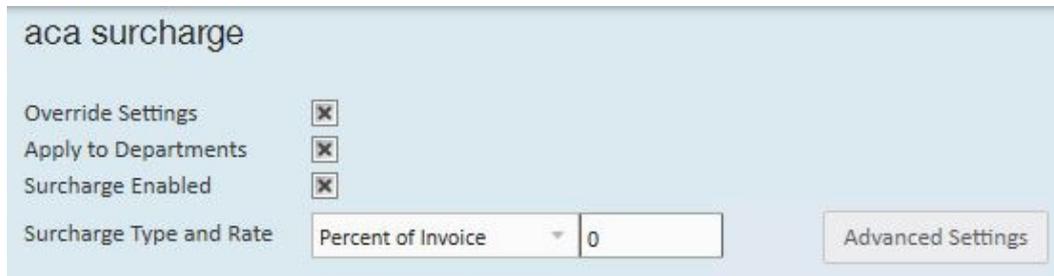
When done, click the save button.

After saving, only the invoicing for employees who fit into the selected statuses will be billed for the surcharge.

Exempting a Customer or Department from the ACA Surcharge:

If you would like a customer or department of a customer to be exempt from the ACA surcharge, there are two ways to accomplish this.

If you would like the surcharge to show on the invoice but at a 0% you will want to setup the *surcharge percentage* as zero (0). Click to place an X in *override settings*, click to place an X in *apply to departments* (if desired). Select *surcharge enabled* and change the *surcharge type and rate* to zero (0):



aca surcharge

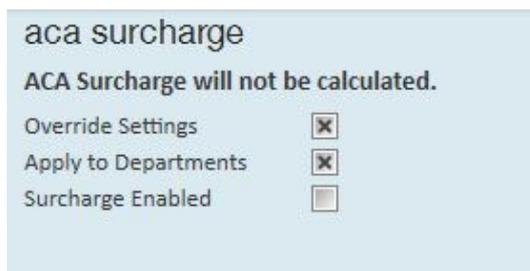
Override Settings

Apply to Departments

Surcharge Enabled

Surcharge Type and Rate Percent of Invoice Advanced Settings

If you would not like the surcharge to show on the invoice you will want to select to *override settings* but do not select to *surcharge enabled*. Note that the description at the top indicates that a surcharge will not be calculated.



aca surcharge

ACA Surcharge will not be calculated.

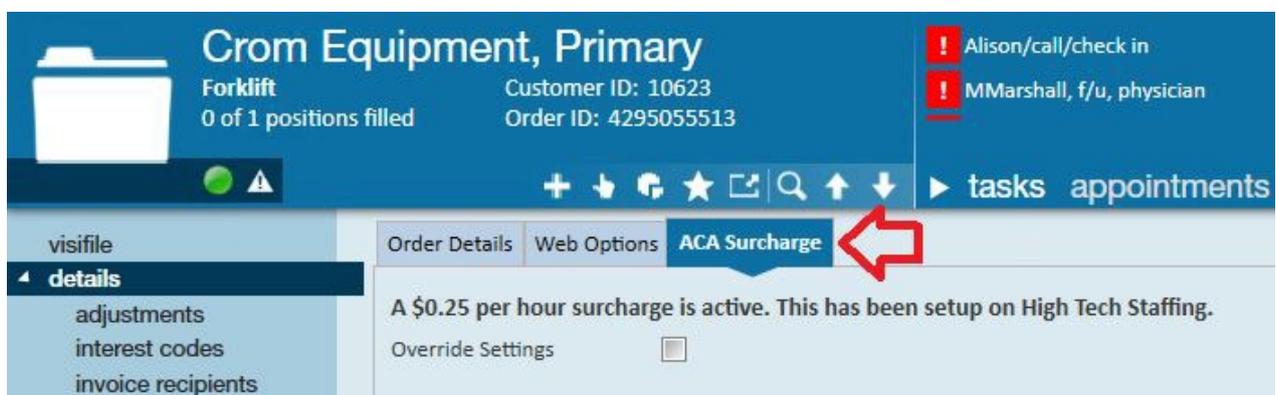
Override Settings

Apply to Departments

Surcharge Enabled

Adding an Order Specific Surcharge:

To add or adjust the system default rate for an ACA surcharge on a specific order, access the order and click details. At the top of the details form, select the ACA surcharge tab:



Crom Equipment, Primary

Forklift
0 of 1 positions filled

Customer ID: 10623
Order ID: 4295055513

Alison/call/check in
MMarshall, f/u, physician

tasks appointments

visifile

details

adjustments
interest codes
invoice recipients

Order Details Web Options **ACA Surcharge**

A \$0.25 per hour surcharge is active. This has been setup on High Tech Staffing.

Override Settings

To override the ACA surcharges at the order level click to place an x in the *override setting* box.

Order Details	Web Options	ACA Surcharge
Override Settings	<input checked="" type="checkbox"/>	
Surcharge Enabled	<input checked="" type="checkbox"/>	
Surcharge Type and Rate	Percent of Invoice	15

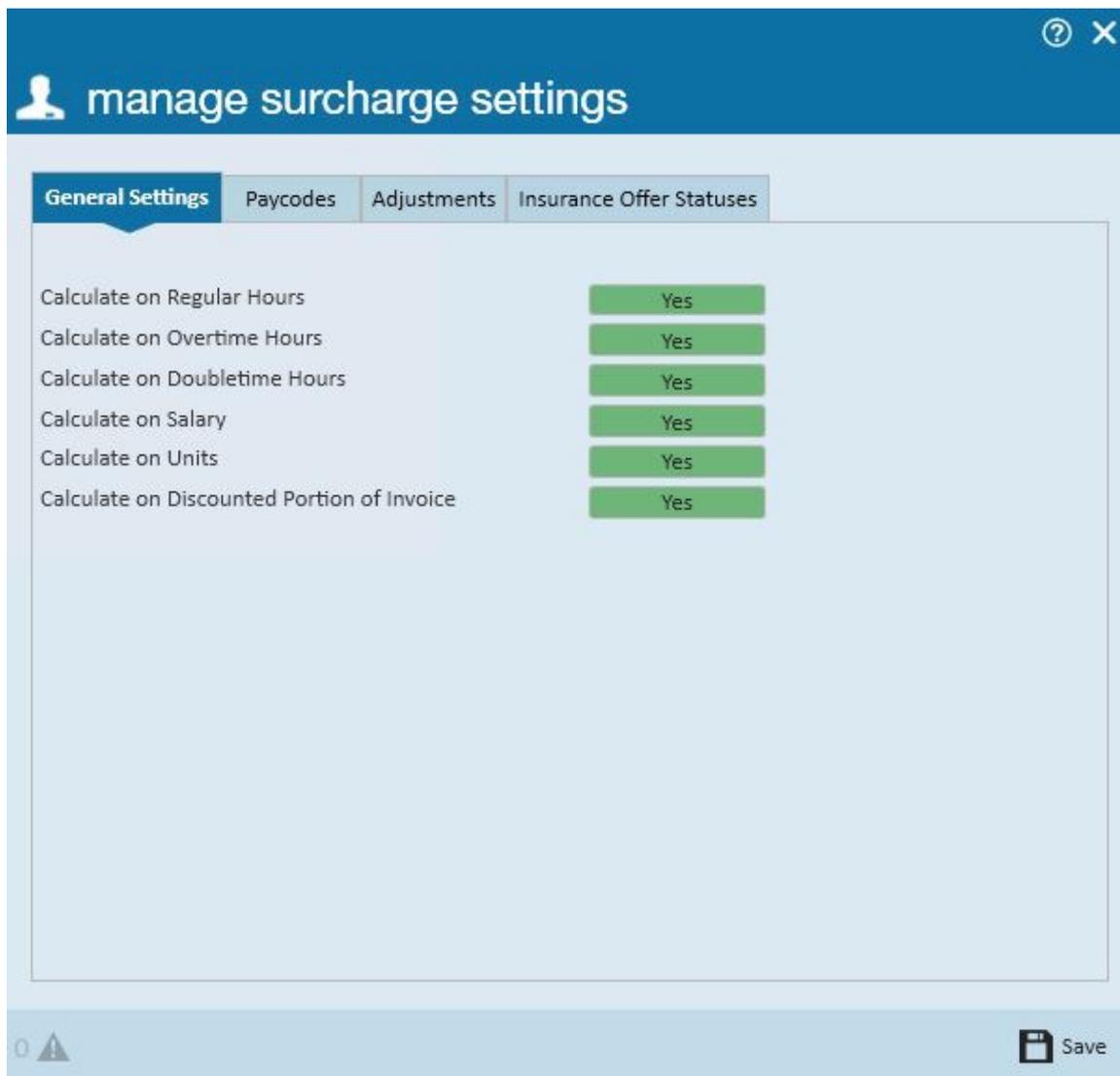
Advanced Settings

This will open a *surcharge enabled* check box:

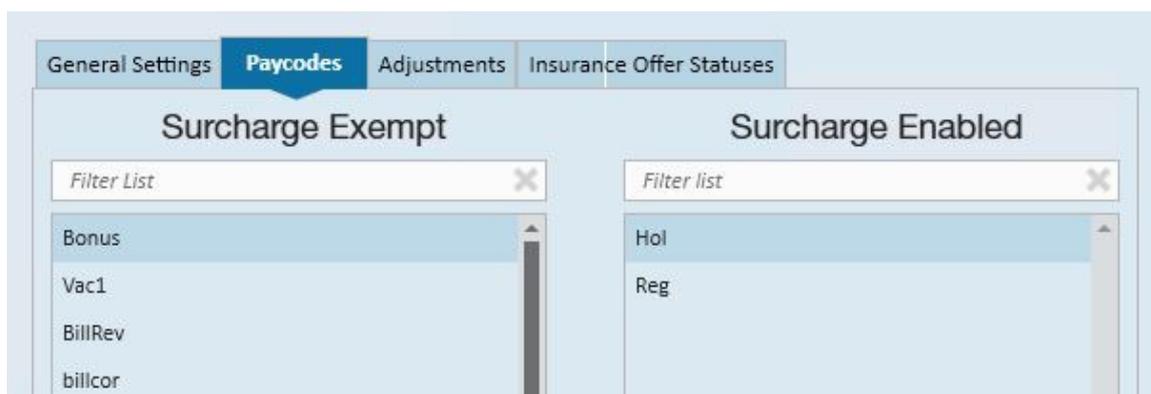
To enable the order specific surcharge click to place an x in the *surcharge enabled* box:

- Select the surcharge rate at which to bill this order.
- In the *surcharge type and rate* field select the basis for the surcharge; *percentage of payroll cost, amount per hour, flat rate per adent* or *percentage of invoice*.
- If you select *percentage of payroll cost*, the surcharge will be calculated based on the percentage of the cost of the payroll.
- If you select *Amount Per Hour*, this is the amount per hour billed (based on the ACA advanced settings selected) that will be added to your customer's invoices. If you select *flat rate Per adent*, the amount billed will be per employee being billed.
- If you selected *percentage of invoice*, this is the percentage of the billings (based on the ACA offer statuses selected) that will be add to your customer's invoices.

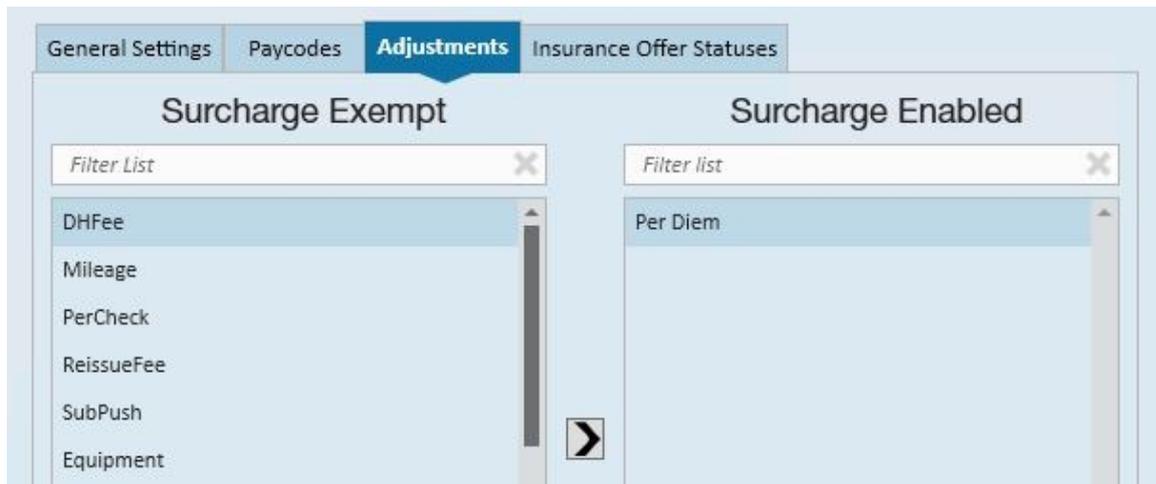
Click to select *advanced settings* if surcharges are going to be billed to help offset the cost of ACA insurance, and you want to also determine what hours, paycodes, adjustments, and offer statuses will be used to determine the surcharge amount.



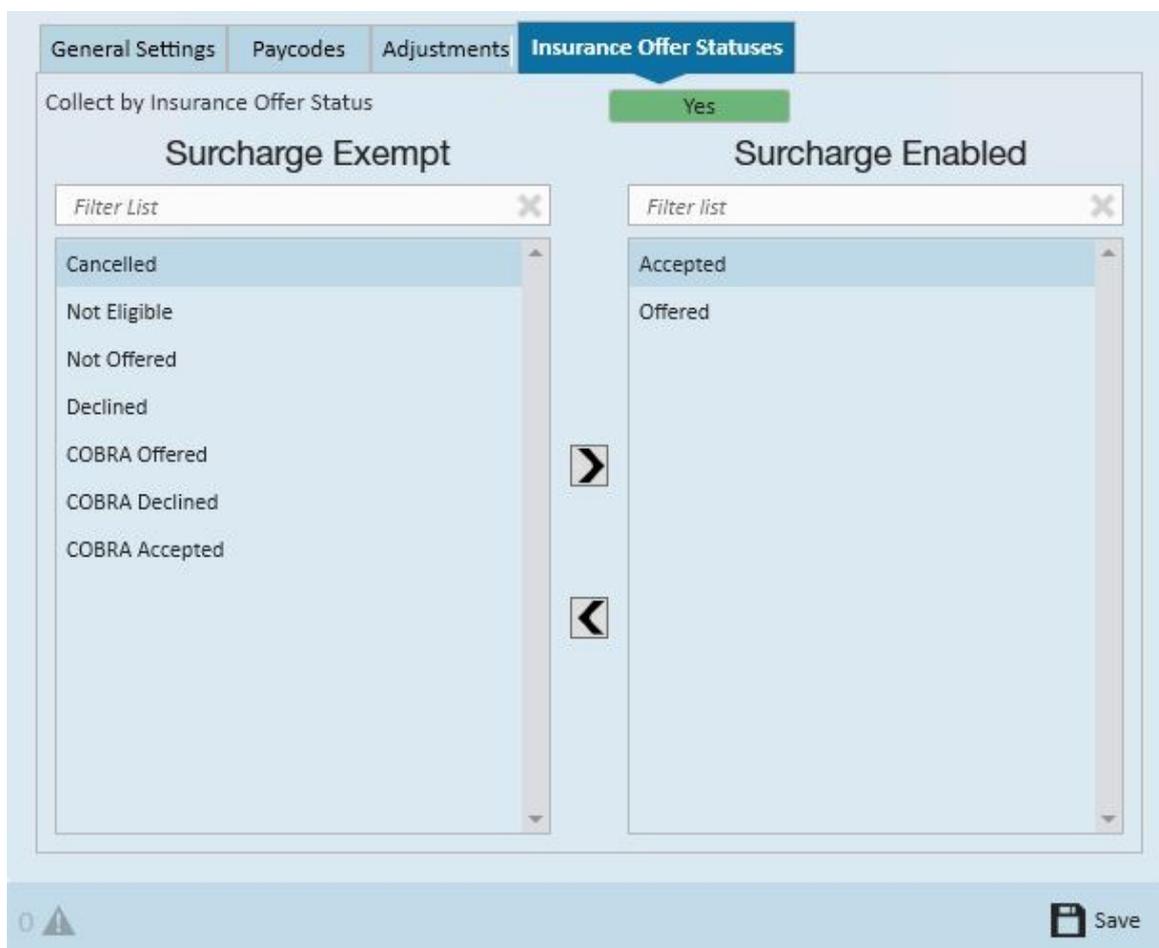
General settings: Select each type of hours/pay that should be used in calculating the surcharge.



Paycodes: Select the paycodes that should be used in calculating the surcharge.



Adjustments: Select the adjustment codes that should be used in calculating the surcharge.



Insurance Offer Statuses: Select the insurance offer statuses that should be used in calculating the surcharge.

Note to select the options in the paycodes, adjustments, and insurance offer status forms click to select the options desired on the left (exempt) then click the right facing arrow to move the option to the enabled (right) side.

Note for insurance offer status only, if you would like to extend the surcharge based on status,

make sure the yes/no toggle to set to yes.

When done, click the *Save* button.

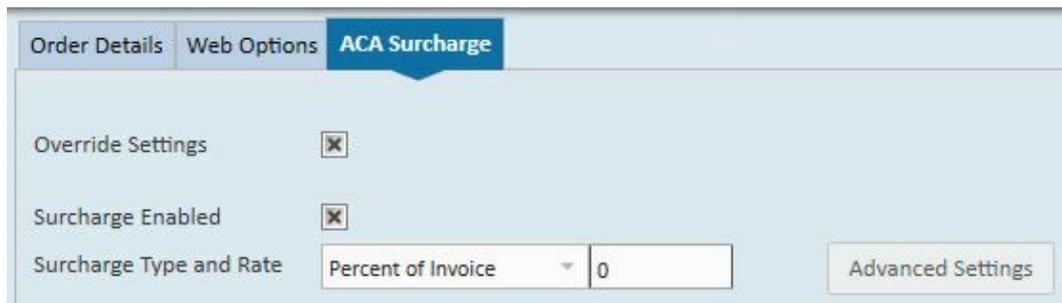
After saving, only the invoicing for employees who fit into the selected statuses will be billed for the surcharge.

Exempting an Order from the ACA Surcharge:

If you would like an order to be exempt from the ACA surcharge, there are two ways to accomplish this.

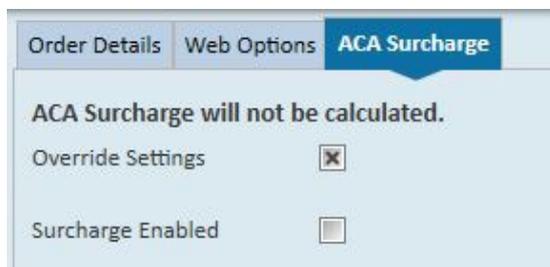
If you would like the surcharge to show on the invoice but at a 0% you will want to setup the *surcharge percentage* as zero (0). Click to place an X in *override settings*, click to place an X in *apply to departments* (if desired).

Select *surcharge enabled* and change the *surcharge type and rate* to zero (0):



The screenshot shows a software interface with three tabs: 'Order Details', 'Web Options', and 'ACA Surcharge'. The 'ACA Surcharge' tab is active. Below the tabs, there are three rows of settings. The first row is 'Override Settings' with a checked checkbox. The second row is 'Surcharge Enabled' with a checked checkbox. The third row is 'Surcharge Type and Rate', which includes a dropdown menu set to 'Percent of Invoice' and a text input field containing '0'. To the right of these settings is a button labeled 'Advanced Settings'.

If you would not like the surcharge to show on the invoice you will want to select to override settings but do not select to *surcharge enabled*. Note that the description at the top indicates that a surcharge will not be calculated.



The screenshot shows the same software interface as the previous one. The 'ACA Surcharge' tab is active. At the top of the settings area, a message reads 'ACA Surcharge will not be calculated.' Below this message, the 'Override Settings' checkbox is checked, and the 'Surcharge Enabled' checkbox is unchecked.

Note If you had previously enabled the surcharge at the employer level, and set up custom rates at the customer or order level, the calculation method and rates will NOT be overridden on the customer or order if you switch calculation methods and rates in the administration/employer area. Any changes at the administration level will NOT affect any calculation method already existing at the customer or order.

Enhanced ACA Module

There are several additional features available in the Enhanced ACA Module. The Enhanced ACA Module is designed to improve even further on the efficiencies of the ACA features in TempWorks by combining ACA data into easy to read dashboards and analytics. The ACA dashboard is an additional module of TempWorks. If you do not have this option in your database please contact your Account Manager for more information.

Employee ACA Window

If your company has the Enhanced ACA Module the following window will be accessible from the employee record details/ACA. The employee ACA dashboard combines relevant ACA information in one convenient place along with providing some useful graphical data.

Employee ACA Setup

Employee: Dalyce "Aly" Brell
 59 Dart Drive, East Lansing, MI 48823
 ID: 12934, SSN: xxx-xx-3213

ACA Setup:
 ACA Status: Full-Time
 Hire Date: 9/12/2014
 Last Eval: 9/12/2014
 Insurance: Accepted
 Effective Date of Insurance: 2/1/2015

Analytics: Hour Breakout chart showing monthly ACA values from May to April.

Month	ACA Value
May	0
Jun	0
Jul	0
Aug	39.75
Sep	0
Oct	40
Nov	0
Dec	62
Jan	0
Feb	0
Mar	24
Apr	0

Assignments:

Title	Customer	Department	Code	Start	End	Bill	Pay
Accountant	Blyss Cosmetics	Accounting	Open	3/8/2016		\$15.00	\$8.00
Health Information...	Blyss Cosmetics	Primary	CO	2/22/2016	2/22/2016	\$20.02	\$15.28
Health Information...	Blyss Cosmetics	Primary	DE	1/31/2016	2/21/2016	\$19.36	\$14.78
Forklift	Blyss Cosmetics	Warehouse	DE	2/9/2016	2/9/2016	\$16.15	\$12.00
Health Information...	Blyss Cosmetics	Primary	DE	1/31/2016	1/31/2016	\$18.21	\$13.90

Adjustments:

EINC	Adjustment	Description	Active	Sequence	WTD Total	MTD Total	YTD Total	Lifetime Total
	ACA EE	Health Insurance	<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00
	ACA ER	Employer Portion	<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00

Employee ACA Setup

The ACA setup that is available under the employee record pay setup window is also available on

the employee's ACA dashboard.

You may set up the ACA information in either place. Changes made to the set up in one area will automatically be reflected in the other.

The screenshot shows a 'setup' form with several fields. At the top, there are tabs for 'Details', 'Family', and 'Comments'. The 'Details' tab is active. The form contains the following fields:

- ACA Status: Full-Time
- Admin Status: Overdue
- Hire Date: 9/12/2014
- Insurance Due: [empty]
- Last Eval: 9/12/2014
- Next Eval: [empty]
- Insurance: Accepted
- Effective Date of Insurance: 2/1/2015

Employee Dashboard:

The Employee ACA dashboard also displays assignment information and adjustment information.

Only adjustments that were setup and coded as ACA adjustments will be displayed here, unlike the adjustments setup on the regular pay setup/adjustments area which will display all adjustments.

This allows for quick entry and view of only ACA relevant information in one place.

The screenshot shows two tables. The first table is titled 'assignments' and the second is titled 'adjustments'.

Title	Customer	Department	Code	Start	End	Bill	Pay
Accountant	Blyss Cosmetics	Accounting	Open	3/8/2016		\$15.00	\$8.00
Health Information...	Blyss Cosmetics	Primary	CO	2/22/2016	2/22/2016	\$20.02	\$15.28
Health Information...	Blyss Cosmetics	Primary	DE	1/31/2016	2/21/2016	\$19.36	\$14.78
Forklift	Blyss Cosmetics	Warehouse	DE	2/9/2016	2/9/2016	\$16.15	\$12.00
Health Information...	Blyss Cosmetics	Primary	DE	1/31/2016	1/31/2016	\$18.21	\$13.90

Adjustment	Description	Active	Sequence	WTD Total	MTD Total	YTD Total	Lifetime Total
ACA EE	Health Insurance	<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00
ACA ER	Employer Portion	<input checked="" type="checkbox"/>		\$0.00	\$0.00	\$0.00	\$0.00

The upper right corner provides the opportunity to view two different graphs.

To view a trending of hours click on *hours breakout* in the upper right.

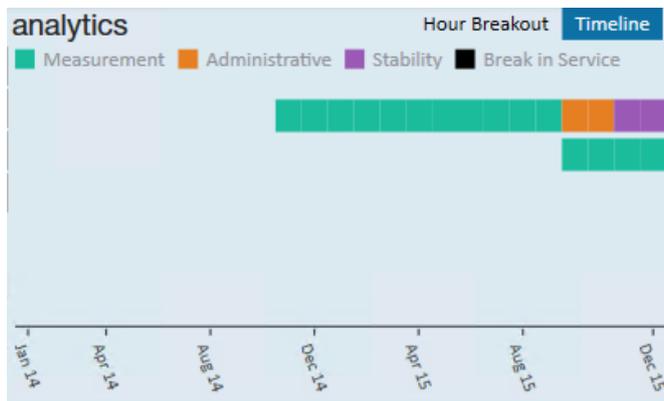


The graph will display 12 months of monthly hours totals from current month back to the previous 11 months. Totals for each month are listed as well.

To view an ACA Status Timeline click on the *Timeline* in the upper right.

The timeline will reference your measurement period, administrative period and stability period lengths that your administrator set up. It also will reference any breaks in service based off the ACA 16 week break in service rule as well as the ACA assignment length break in service rule.

An employee who was just setup with an ACA status and had no previous assignment history would look similar to the following:



A new employee will have two timelines. The first timeline line (cycle) is the *initial measurement*. The second line is the next cycle leading up to the next administrative period.

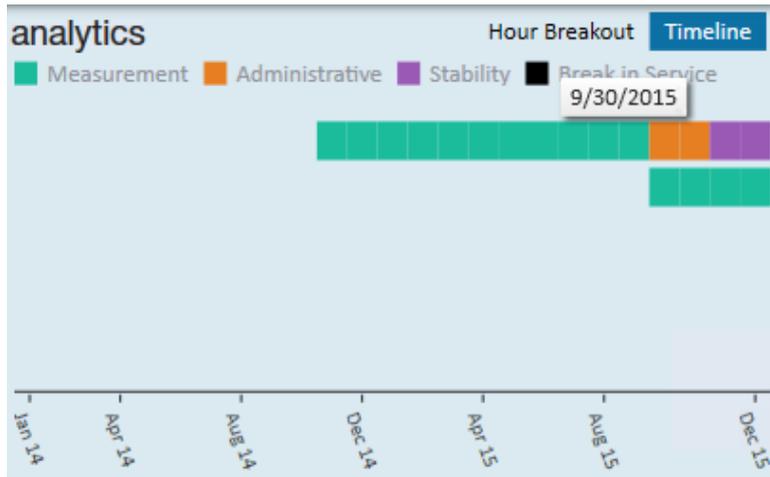
Keep in mind that an employee can be in the administrative period or stability period for one cycle and the measurement period for the next. Thus, the reason you see two cycles in the example of a new employee.

Note Employees who are not being offered coverage will be reflected in the administrative period.

Over the course of several years an employee will have a timeline for each ACA cycle.

Example: Cycle A 2014/2015, Cycle B 2015/2016, Cycle C 2016/2017, Etc. up to a system maximum of 6, at which time the oldest cycle will drop off and the most recent cycle will replace it.

The timeline dates displayed in the grid will always be reflective of your current cycle. You may view specific dates for all cycles by hovering your cursor over the start and end points of the periods in the grid and the MM/DD/YYYY date format will display.

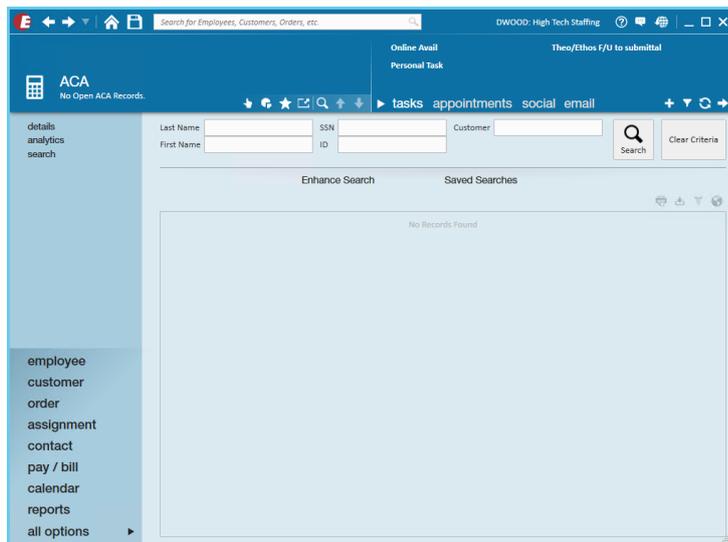


Company ACA Dashboard:

The company ACA dashboard is an area that will provide useful ACA analytics at a single glance. Many options include the ability to drill down to the source information.

To access the ACA Dashboard, select All options/ACA

The following window will display:



In the upper left menu select *analytics*. The following window will display:



- Cost of insurance - The cost of insurance widget displays a one year look back trend of employee contribution and employer contribution for any adjustments that are set up as ACA adjustment types.
- Employee Status - The employee status widget displays the number of employees who are currently in an administrative period as well as the number of employees who are approaching insurance eligibility based on their historical hours and the number of hours that were set up in administration as approaching fulltime equivalent status.
 - This widget provides drill down capability.
 - Clicking on the widget will navigate you to a search list which will display the employees who are represented in the widget statistics.
- Assigned Employees - The assigned employees widget will display the percentage of your

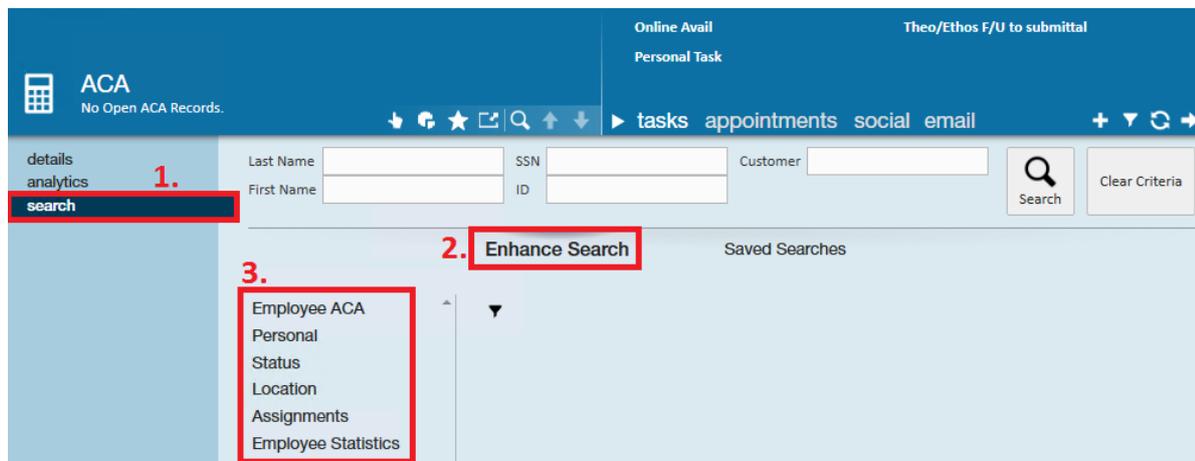
assigned employees who have an ACA insurance status of accepted.

- Offered Status - The offered status widget displays the percentage of employees who have been offered, have declined or have accepted insurance vs. those who have an ACA insurance status of something other than offered, declined or accepted.
 - This metric is an important metric to determine if you are in audit compliance regarding the percentage of employees who are required to have been offered insurance.

ACA Enhanced Search:

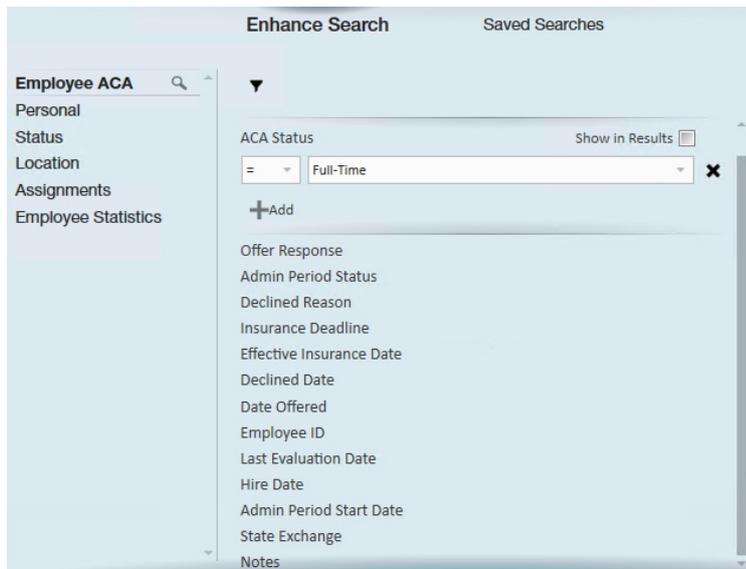
To access the ACA Enhanced Searching, select all options/ACA

Click on the search option in the upper left (1.). Click enhanced search (2.). The following search options will be displayed (3.):

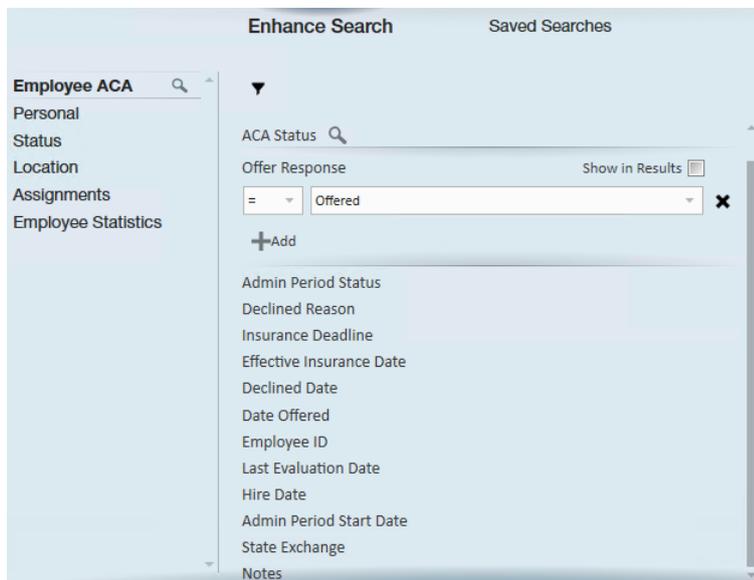


For complete details on TempWorks Enterprise Enhanced search functionality please refer our Knowledge Base article on [searching](#).

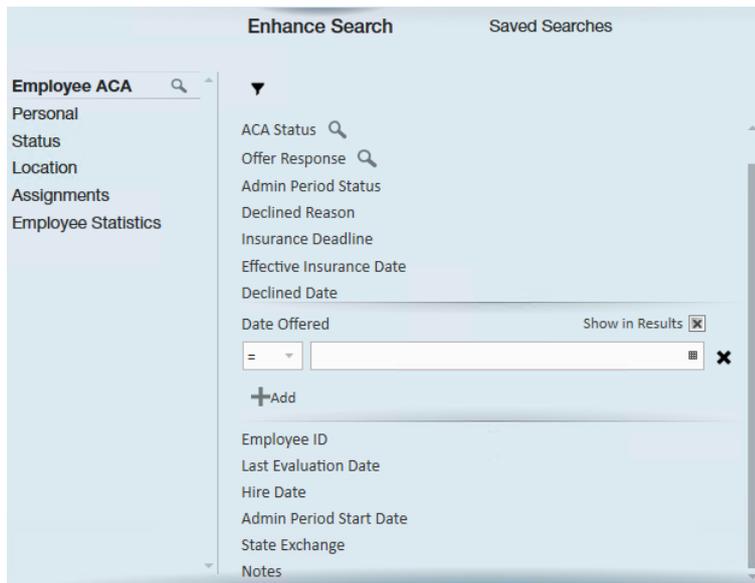
Below is an example of a search you may run from the ACA enhanced search window:



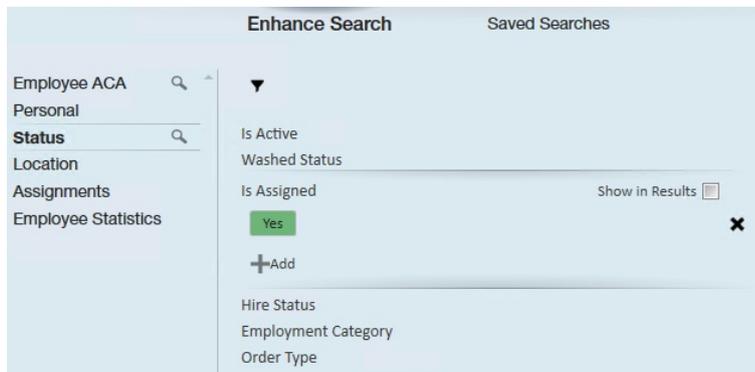
Employee ACA/ACA status = full-time



Employee ACA/offer response = offered



Employee ACA/date offered - show in results



Status/is assigned/yes

Click *search*.

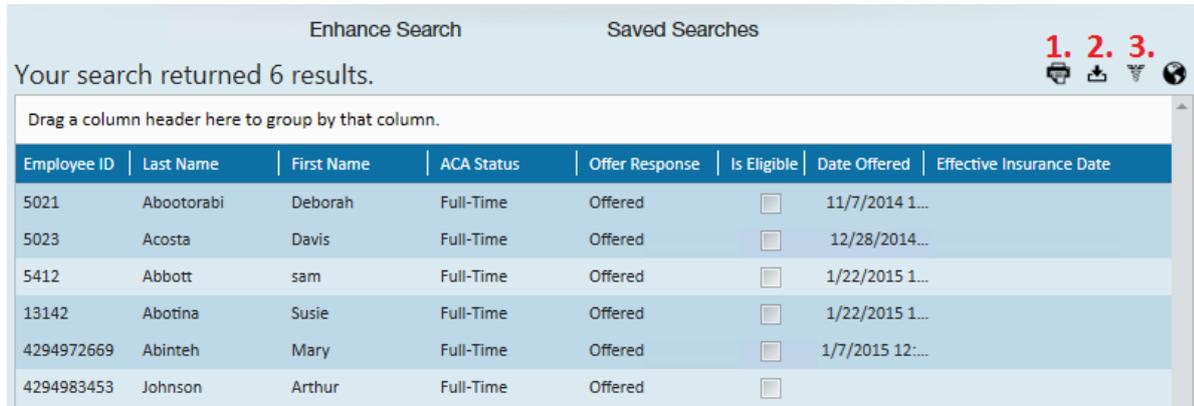
Your search results will be displayed:

Your search returned 6 results.

Employee ID	Last Name	First Name	ACA Status	Offer Response	Is Eligible	Date Offered	Effective Insurance Date
5021	Abootorabi	Deborah	Full-Time	Offered	<input type="checkbox"/>	11/7/2014 1...	
5023	Acosta	Davis	Full-Time	Offered	<input type="checkbox"/>	12/28/2014...	
5412	Abbott	sam	Full-Time	Offered	<input type="checkbox"/>	1/22/2015 1...	
13142	Abotina	Susie	Full-Time	Offered	<input type="checkbox"/>	1/22/2015 1...	
4294972669	Abinteh	Mary	Full-Time	Offered	<input type="checkbox"/>	1/7/2015 12...	

ACA Status Mass Update

You may print the results (1.), export the results to excel (2.) or you may click to highlight one or more employees in the search results list and click the change ACA status option (3.) in the upper right corner of the search list.



Enhance Search Saved Searches

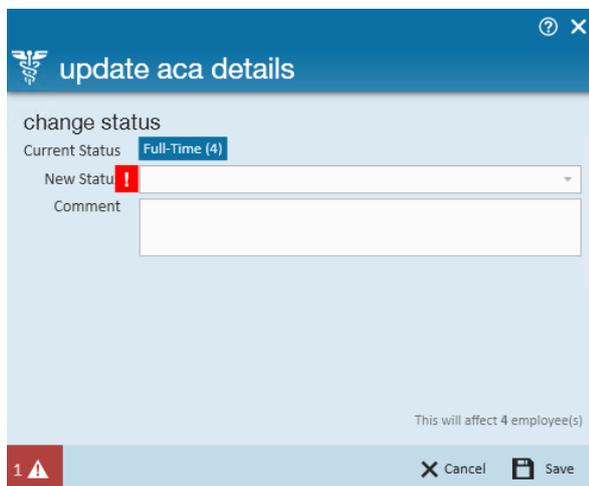
Your search returned 6 results.

1. 2. 3.

Drag a column header here to group by that column.

Employee ID	Last Name	First Name	ACA Status	Offer Response	Is Eligible	Date Offered	Effective Insurance Date
5021	Abootorabi	Deborah	Full-Time	Offered	<input type="checkbox"/>	11/7/2014 1...	
5023	Acosta	Davis	Full-Time	Offered	<input type="checkbox"/>	12/28/2014...	
5412	Abbott	sam	Full-Time	Offered	<input type="checkbox"/>	1/22/2015 1...	
13142	Abotina	Susie	Full-Time	Offered	<input type="checkbox"/>	1/22/2015 1...	
4294972669	Abinteh	Mary	Full-Time	Offered	<input type="checkbox"/>	1/7/2015 12...	
4294983453	Johnson	Arthur	Full-Time	Offered	<input type="checkbox"/>		

If you select to update the ACA status the following window will display:



update aca details

change status

Current Status: Full-Time (4)

New Status:

Comment:

This will affect 4 employee(s)

1

Select the new status you would like to change for the selected employees then click *save*.

Other ACA Considerations

There are many tools within TempWorks Enterprise that you may choose to utilize that will help you with areas of ACA administration. Following are some ideas you may wish to implement within your organization.

Doc Center or HRCenter:

DocCenter and HRCenter can be used as a tool for your employees to either enroll in your ACA

insurance plan or to decline the insurance plan.

If you are using either DocCenter or HRCenter you may wish to send your account manager your insurance enrollment forms to have them added as part of your on-boarding document process. Those forms can be set up to Post Fill into the insurance status field on the ACA setup section.

Email Templates and Mass Email

You may wish to use the employee search area to search for employees who have been offered insurance but who have not responded.

If you have created an email template for a reminder, you can use the mass email capability to quickly contact your employees with a reminder. This will automatically document in each employee record that the notification was sent.

Custom Employee Reports

You may wish to use the employee specific reports and have a custom report created for Cobra notification letters.

If your insurance carrier is not sending these notifications out for you, having the letter generate with the employee information pre-filled will save you administration time.

Assignment Restrictions

You may wish to set up assignment restrictions in relation to the employee ACA setup.

For example, a useful assignment restriction may be one that gives a soft (warning) or hard (cannot continue) stop if an employee is assigned and they do not have ACA coding set up in their pay setup window. When deciding on assignment restrictions, remember to keep in mind your company's operational process.

The example above would not work, operationally, if your company is not allowing recruiters to code ACA and tasking the payroll department with ACA Coding.

Note At the time of this writing, there is a default assignment restriction which will warn (soft stop) when assigning an employee who does not have an ACA hire date.

Appendix A - ACA Initialization Process

To assist you with the initial coding of your employees who have worked for you , TempWorks

will be running an initial process on your database the night of October 1, 2014.

Note You must have your administration section ACA periods set up prior to the night of 10/1/2014. If you do not have this set up, the initialization process will be unable to process the calculations and initialization will not be performed on your employee records.

Note If you are not live on an ACA compatible version of TempWorks by 10/1/2014, this initialization process can be run manually on your system. Please contact product support to request the initialization of your ACA employee coding.

The initialization process will:

1. Clear out any ACA hire dates that have been coded on the employee ACA coding section:

The screenshot shows a web-based form titled "affordable care act". At the top right, there are three tabs: "Details" (which is active and highlighted in blue), "Family", and "Comments". Below the tabs, the form contains several input fields and dropdown menus. On the left side, there are four rows: "ACA Status" with the value "Full-Time", "Hire Date" with the value "2/26/2014", "Last Eval" with the value "2/1/2016", and "Insurance" with a dropdown menu showing "Accepted". On the right side, there are three rows: "Admin Status" with a dropdown menu, "Insurance Due" with an empty input field, and "Next Eval" with an empty input field. At the bottom, there is a row for "Effective Date of Insurance" with the value "5/20/2015" and a small calendar icon to its right.

2. Clear out any previously calculated cycles and dates if hire date was previously entered. (Last eval, admin status, insurance due, next eval...)

3. Add hire date to the employee ACA coding section based on the timecard history that exists in the TempWorks Enterprise database.

a. Hire date = The first day of the first week the employee was paid. If there was a break in service per the ACA break in service rules, the hire date is the first day of the first week they were paid after the last break in service.

The initialization process will not:

1. It will not clear out any insurance statuses that existed on the employee records at the time the initialization is performed.
2. It will not insert a hire date for any employees who are assigned on their first assignment but have not yet been paid at the time of the initialization process. You will want to identify any employees who fall into the above criteria and after 10/1/2014 enter their hire date in the ACA employee coding section. (Employee/pay setup)

Note If you do not code an employee who meets the above criteria you will receive a warning

during the payroll proofing that the employee does not have an ACA hire date.

After the initialization process has been completed you will want to identify those employees who should be coded as full time and offered insurance and those who should be coded as part time with an insurance status of not eligible.

The Affordable Care Act reports in TempWorks Enterprise will be useful in identifying these two groups of employees.

The ACA lookback reports can be used to identify the employees who, based on your selected transitional measurement period, qualify as full time status and should be coded with an ACA status of full time and offered insurance.

To identify these employees, run the Affordable Care Act benefit lookback list report using your transitional measurement period dates, selecting *show current assigned employees*, group by *employee* and entering 30 into the average hours \leq field:

To identify the employees who are currently assigned but who do not qualify as full time (average 30 hours during the transitional measurement period), run the ACA employee details report with the criteria displayed below.

Note you may also choose to run this report using the average hours min = 0 and average hours max = 29.99.*Note - The approaching FTE and not FTE status for the employee is calculated based on the employee average hours during the measurement period for which they are in.

Appendix B - How and When are Employee ACA Cycle Dates Calculated

The employee ACA cycle dates are automatically calculated in your database each night during a procedure called daily maintenance.

- Measurement period
- Insurance due date
 - Execute date must be between admin period start and end date, thus you will start to see these populated during the administrative period
 - The insurance offer response must have a non decline reason, ie: accepted or

offered

- Next evaluation
- Admin period status
- Break in service
 - If an ACA defined break in service is calculated, this will end the cycle for an employee, clear out the ACA hire date and require a rehire to occur
 - This date will clear out 2 weeks after the break in service criteria is met to accommodate for biweekly payroll and late timecards

Related Articles