Auditing Employee Records with ACA Searches

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ACA Searching Overview

You can use searching to audit employee records and review ACA related information quickly. While we have a lot of ACA related report options, searches can be easier to use for items you need to take action on because you will be able to immediately open, review, and edit the records in your search results. ACA specific search fields can be found in Enterprise or Beyond.

Enterprise:

- 1. Navigate to Employee Search
- 2. Select Enhance Search
- 3. Find the ACA category on the left



To learn more about employee searching, check out Enterprise - Employee Searching.

Beyond:

1. Navigate to Employee Search

- 2. Select Advanced Search tab
- 3. Select the + Rule button
- 4. Use the arrow on the left to open up the categories option and select ACA

Search / Employees / Advanced				
BASIC			ADVANCED	
E Click to select a saved search				^
NOT AND OR I > Is Active Field + Show category / GROUP	× • •	IS TRUE 🔻	Show in results	××

5. Choose from the ACA related fields to search by

E Click to select a saved search				
□ NOT AND OR □ □ > Is Active	× -	IS TRUE 👻	Show in results	6
	< - <	Field	ſ	
T + RULE / GROUP		ACA Status		
SAVE		Admin Period Sta	art Date	RESET
	Admin Period Status			
Search returned 50 results Admin Period Status, Is Active	Date Offered			

To learn more about searching in Beyond, check out Beyond - Advanced Searching.

You can build and save your own searches for your company needs. Below we walk through a few examples of common searches that your team might need. Note that these searches are just examples of ways you can leverage searches in the system and your team might need to consider how to best search based on your processes.

This article covers the following search examples:

- 1. Searching by Admin Period Status
- 2. Who is in an Administrative Period
- 3. Who Accepted Insurance Recently
- 4. Who is Missing an ACA Hire Date

Current ACA Admin Period Status

You can run a search to see all employees in a specific ACA cycle status or search based on status and use the grouping options to see how many employees are in which status.

	Enhance Search	Saved Searches
Universal Search Location Profile Personal Status	▼ Is Eligible ACA Status Offer Response	Î
Assignments	Admin Period Status	Show in Results
Document Direct Hire	Add Value	
Job History Employee EEO Infor…	Declined F Administrative Insurance Break in Service	
Testing Education	Effective II Overdue Declined Date	

- Measurement: currently in an initial or standard measurement period (check out ACA Admin: Setting Up ACA Look Back Method for more information)
- Administrative: currently in an administrative period
- Break in Service: employee has not worked for the required amount of time to qualify for a break in service
- **Overdue:** You are past the employer mandated amount of time allowed to review the ACA status of this employee

If you select the checkbox to show in results without selecting a status, you will be able to see all employees and their current status:

Is Eligible	
ACA Status	
Offer Response	
Admin Period Status	Show in Results
= •	× ×
Add	
Declined Reason	

Drag and drop the columns to group by:

	i Large number of results returned - showing first 1000.								
	Admin Peri	iod Status							
IJ	ID	Last Name	First Name	Branch	Phone	Is Acti	ls Assi	Admin Period St	Last Messa
	🖃 Admin Pe	riod Status: Admini	strative (11 items)						
	429508	Alexander	Jaire	Minneapolis	(847) 394-5674	×		Administrative	Placed
	429508	Anderson	Lucy	Minneapolis	(651) 452-0366	×	×	Administrative	Late
	429508	Ball	Kenny	Minneapolis	(752) 562-5425	×		Administrative	
	429508	Bauer	Henry	Minneapolis	(785) 452-5684	×		Administrative	Placed
	16630	Blane	John	Minneapolis	(804) 320-0000	×		Administrative	Order Cand
	429497	Brock	Eddie	Minneapolis		×	×	Administrative	Ended
	429501	. Burnevik	Bjorn	Minneapolis	(612) 555-1234	×	×	Administrative	Late
	429508	. bustamante	ronald	Minneapolis	(551) 556-8558	×		Administrative	
	429501	. Clerk	Jennifer	Minneapolis	(651) 111-2100	×	×	Administrative	Order Cand
	429508	. Coin	Steve	Minneapolis	(745) 856-5254	×		Administrative	Message
	429508	Crocket	Lisa	Minneapolis	(956) 365-8452	×	×	Administrative	WebToAllEr
	🖃 Admin Pe	riod Status: Break i	n Service (4 items)						
	429508	Brians	Taylor	Minneapolis	(651) 444-2222	×		Break in Service	WebToEmp
	429508	Crowthers	Kenneth	Minneapolis	303941871	×		Break in Service	
l	429508	Daley	lordan	National Acco	(801) 803-8891	¥		Break in Service	

Consider using this search option in conjunction with other search parameters for auditing purposes.

Who is in an Administrative Period

This search will look at all employees that are currently in an administrative period and either need their hours reviewed for full time status or need to be offered insurance.

Last Name First Name	SSN All Records	RepName All Reps Document Text Branch All Branc Image: Comparison of the second
	Enhance Search	Saved Searches
Universal Search Location Profile Personal Status	▼ Is Eligible ACA Status Offer Response	
Assignments Order Candidate	Admin Period Status = Administrative	Show in Results
Direct Hire Job History	-Add Declined Reason	

Use the Admin Period Status to select "Administrative" to show all employees that are currently in an administrative period. These employees may need to be reviewed to see if they meet your requirements to be

considered a full time employee before they are offered insurance.

You can narrow down your search further by including their offer response. In this case, selecting the "Is Null" option will show only employees who have probably not been reviewed yet. Insurance status should be set to offered or not offered after their hours have been reviewed.

Offer Res	sponse Show in Results
Is Ni	× ×
< 13	
<=	
. =	riod Status 🔍
>	Reason
>=	Deadline
Not =	Insurance Date
Is Null	Date
Not Null	red

Once you run this report use the hours report to compare hours worked and look at their ACA information under the Pay Setup section of their record:

Jaire Ale 3140 NEIL ARM		VD ID: 42	295082800	Lunch Today	Y	1 Pay	/ upda	te confirm
EAGAN, IVIN 551	121-2272	Branc	h: Minneapolis			Curren	tly vie	wing 2 of 12178
🥏 🗒 🖂 E 🔻 🛷		+ +	G ★ Q 🛧 🔸	► tasks	appointme	nts social	ema	ul
Application Survey Results		Employee Intervi	iew Report		paymen	t options		
California EITC Notification		Employee Tax Se	tup Change Log		Electronic Pa	y Setup Complete		
Credential Check Background Cl	heck	Employee Transa	action Report		Mail Check a	nd/or Stub		
Employee Adjustment Setup Ch	ange Log	Employee Wage	e Statement Email Pay Stub					
Employee Application		HR Center Data L	og		Paycard Requested			
Employee Application HR Cente	r	Paycheck Stub Reprint			Paycheck De	livery Code		
Employee Change Log		Schedule Conflict Test			Default Pay	Rate		
Employee Electronic Pay Setup	Change Log	Wage Verification	n		Note to Payr	oll	Overt	ime Hours are
Employee Hours							empl	oyee
45	Rep	ports			affordab	e care act		Details Fam
electronic pay	Marita	Tax Status	Single	~	ACA Status	Full-Time	R	Admin Status
rate sheet		te.	MN	~	Ular Data	a /aa /aaaa		Due Due
taxes	Tax Star				Hire Date	3/31/2020	'	Insurance Due
tasks	s State Juris			*	Last Eval	3/31/2020		Next Eval
search	Tax By B	Employee State			Insurance			
	Qualifie	es for HIRE Act			local tax	/00		

Next Steps:

Consider the following additional actions for your next steps

- Run the Employee Hours Report
- Mass assign a page or workflow in Beyond
- Add the employees to a Hot List in Enterprise
- Create follow up tasks in Enterprise or Beyond

Who Accepted Insurance Recently

If you are using an HRCenter form or having your recruiters or payroll clerks change the insurance status to accepted, you may need to pull a list of employees who have accepted insurance to continue their enrollment processes.

Last Name	SSN ID	All Records Active	RepName All Reps Document Text Branch All Branc	Q Search
		Enhance Search	Saved Searches	
Universal Search Location Profile Personal	Î	▼ Is Eligible ACA Status		
Status	٩	Offer Response	Show in Results	
Assignments Order Candidate		= The Accepted	· X	
Document	- 1	Add		
Direct Hire		Admin Period Status		

Set the Offer Response search option to "Accepted" to see all employees who have accepted insurance:

Consider using this with Hire Date, Admin Period Status (see employees that are still in administrative period), or Effective Insurance Date(if you are having someone enter this date when an employee accepts insurance) to narrow down the list to employees who have only recently accepted insurance.

Last Name First Name	SSN ID	All Records RepName All Reps Document Text Active Branch All Branc End	
		Enhance Search Saved Searches	
Universal Search Location Profile Personal Status	a	▼ Is Eligible ACA Status Offer Response	
Assignments Order Candidate		Admin Period Status Show in Results	
Document Direct Hire Job History		+Add Declined Reason	

Next Steps:

Consider the following additional actions for your next steps

- Set up their insurance adjustments
- Email employees a confirmation in Enterprise or Beyond
- Send them insurance paperwork or information via HRCenter or WebCenter

Who is Missing an ACA Hire Date

By default, we have assignment restrictions which let recruiters know they need to set an ACA hire date for the employee before they assign them but we know exceptions can happen and dates can get missed. This search will pull up employees who probably should have an ACA hire date but do not have one set in the system.

Navigate to the Hire Date field and choose the "Is Null" option to see all employees that do not have an ACA hire date entered:

Last Name SSN First Name ID	Assigned Active	RepName All Reps Branch All Branc All Branc Saved Searches
Universal Search Location Profile Personal Status Status Assignments Order Candidate Document Direct Hire Job History Employee EEO Infor	Is Eligible ACA Status Offer Response Admin Period Status Declined Reason Insurance Deadline Effective Insurance Date Declined Date Date Offered Last Evaluation Date	
Education Financial	Hire Date	Show in Results
Custom Data ACA Q ACA Statistics	< <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <= <=	
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If hire dates are set when an employee is assigned, you may want to narrow down your search results to only employees who are actively on assignment by switching the toggle at the top of the search to Assigned.

Next Steps:

Consider the following additional actions for your next steps

• Set up their ACA Hire Dates

• Review processes with your staff to ensure everyone is setting Hire Dates correctly

Related Articles