Client Training HQ

Quarter 4 (October- December) ACA Action Items

Product Support recommends that administrators and/or users of ACAMS routinely monitor their instance for data currency and data quality, as well as for eligibility review. Therefore, we provide this Q4 checklist to help keep you on track in an effort to better ensure that you experience a more positive 1094-C and 1095-C reporting season. Here is a checklist of items to be completed in your ACA Management Solution this quarter.

	Event	Action
☐	**User Access Review (Quarterly)**	Review, add, edit, and remove users, as needed, in the ACA Management Solution and Tax Form Management's Production and Test Environments. ***Note:*** There is not a Test Environment for the ACA Management Solution.
☐	**Tax Form Management Portal Configuration (before the start of Q4)**	The Configuration Manager is accessed via Tax Form Management Portal at www.mytaxform.com Navigate to the webManager menu, click on Configuration Manager, and follow the prompts.
☐	**Configure Benefit Plans (if applicable)**	From the ACAMS Configuration tab, review your benefit plans for the current year to ensure accuracy of the start and end dates, the Employee Only cost, and the self-insured indicator. Add plans for the upcoming year. You may do this manually for each of your plans, or use the Duplicate and Extend function and update any associated costs for the Employee and Employer.
☐	**Verify FEINs and Controlled Groups**	From the ACAMS Configuration tab, review your Controlled Groups and the associated FEINs for each. Additionally, ensure that the names, addresses, and contact information are current for each FEIN listed.

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☐	**Data Quality Checks**	Review any Data Quality Checks at the top of the Data Quality Dashboard. Some common checks include: ● Orphaned Payroll ● Orphaned Benefit Transactions ● Orphaned Dependent Benefit Transactions ● Benefit Transactions with Orphaned Plan Code
☐	**IRS Prep Manager Configuration (through December)**	● Review and validate FEINs for the current tax year. ● Force Include/Exclude FEINs for reporting as needed. ● Begin audit of your 1095-C forms to confirm counts and review Employees with Compliance Risk.
☐	**1G Review**	Employees may continue to show coverage after they have been terminated. If the benefit termination record is not present within the solution, there may be erroneous forms for them with a code of 1G. To help identify these potential issues: ● Export and download the Unsent 1095-Cs from the Validate 1095-C tab. ● Filter the entire report on column 'AG' (line14Jan), and choose only 1G. ● Use the resulting list in comparison with your HRIS to help you identify who should no longer have offers of coverage ● Send a termination of benefits transaction on the Employee Benefits Transaction file.
☐	**Form Validation Review**	● The goal of Form Validation is to help prevent users from sending 1095-C records with bad data to the IRS, which could ultimately lead to rejection of the entire filing. These forms are held back in the IRS Prep Manager until the errors are resolved. ● Any 1095-Cs that have failed validation will appear in the Validation Failed sub-tab of the Validate 1095-Cs tab in the IRS Prep Manager. ● After updating the form with the correct values, select the Run Form Validation button, and the updated form should move to the Unsent 1095-Cs sub-tab.
☐	**Send Test Files to TFM (through December)**	● Send two separate test files to test TFM via the Send 1095-Cs tab in the IRS Prep Manager. Then, click Send Test File. ● Log in to test TFM to review print vendor reports and print proofs.

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☐	**Open Enrollment (varies based on your organization)**	• Validate data for Open Enrollment. • Run Open Enrollment reports.
☐	**Data Currency (Bi-Weekly or Monthly)**	Review the Data Quality Dashboard to help ensure that data within the application is current. For example: ☐ Does your **Payroll Summary - Pay Period** snapshot show the most recent Pay Date expected? ☐ Do you have any newly hired employees that are not showing in your Employee search? ☐ Do you have any Orphaned Payroll, Benefit Transactions, or Dependent Transactions for the current tax year?
☐	**Eligibility Reports (Monthly)**	Review your Eligibility reports to see if you have recent part-time employees who are finishing an Initial Measurement Period and will become eligible for benefits. ☐ Lookback Projections ☐ Lookback Determinations ☐ All Lookback Results
☐	**Compliance Reports (Monthly)**	Review your Compliance Scorecard to see if your FEINs are over **95%** for MEC offers. Review your Employees with Compliance Risk report to see who might be missing an offer of coverage.

Need Additional Support?

Should you have any questions regarding completion of any or all of these action items, please don't hesitate to contact ACA Product Support.

More Training Available!

Check out additional training resources available on our site, Connections.

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.