

Client Training HQ

Quarter 3 (July - September) ACA Action Items

It is highly recommended that administrators and/or users of the ACA Management Solution (ACAMS) routinely monitor their ACAMS instance for data currency and data quality, as well as for eligibility and review. Therefore, we are providing you with this quarterly checklist to help keep you on track in an effort to help you experience an optimal reporting season.

	Event	Action
☐	User Access Review (Quarterly)	Review, add, edit, and remove users, as needed, in the ACA Management Solution and Tax Forms Management's Production and Test environments. Note: There is not a Test environment for the ACA Management Solution.
☐	Data Currency (Bi-Weekly or Monthly)	Review the Data Quality Dashboard to ensure that data within your solution is current. For Example: ☐ Does your <i>Payroll Summary - Pay Period</i> 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	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.
☐	PGP Key Update (Twice a Year)	Download the Equifax Public Key and import into your key ring by 8/31.

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.