

# Client Training HQ

## Annual Enrollment Report

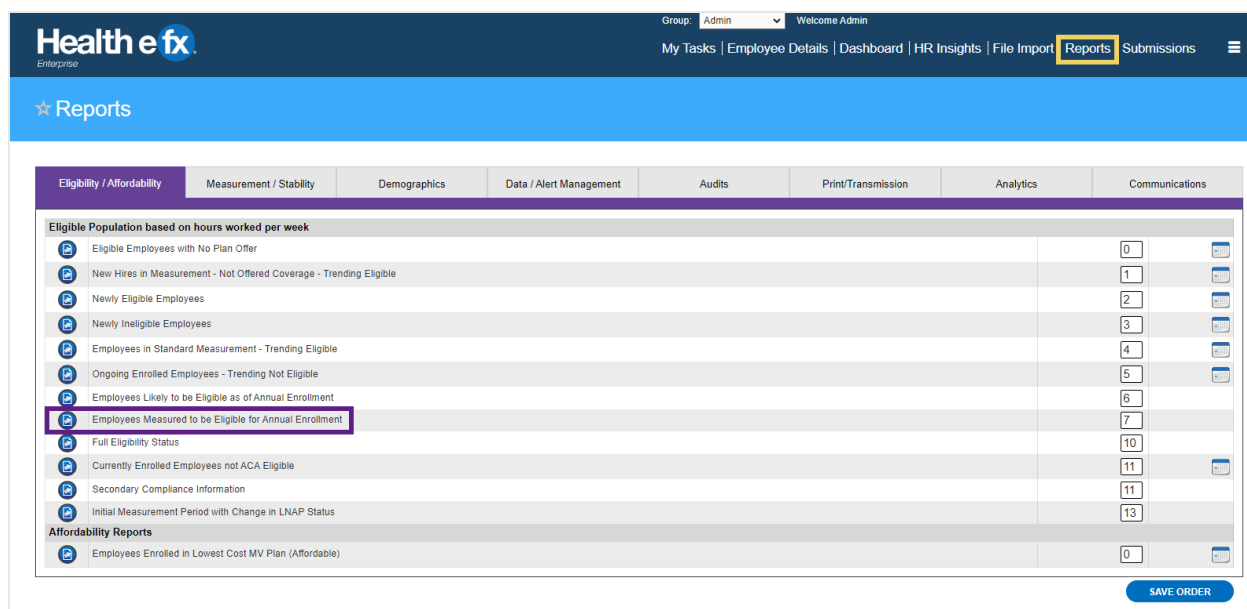
We know you put a lot of effort into preparing for Annual Enrollment each year. The Health e(fx) Annual Enrollment (AE) report provides eligibility information to simplify the process of offering annual benefits to your ACA eligible employee population.

### When is the Annual Enrollment Available?

The Annual Enrollment process cannot be completed until the payroll file(s) that contains the last pay period in your standard measurement period(s) are in the Health e(fx) system. For example, if your standard measurement period ends October 3rd for a January 1st plan year, your Annual Enrollment Report can be run after the payroll file(s) that contains hours through October 3rd are received in the system.

### To Run the Annual Enrollment Process:

1. Click the blue icon next to **Employees Measured to be Eligible for Annual Enrollment**.



Eligibility / Affordability	Measurement / Stability	Demographics	Data / Alert Management	Audits	Print/Transmission	Analytics	Communications
<b>Eligible Population based on hours worked per week</b>							
Eligible Employees with No Plan Offer						0	
New Hires in Measurement - Not Offered Coverage - Trending Eligible						1	
Newly Eligible Employees						2	
Newly Ineligible Employees						3	
Employees in Standard Measurement - Trending Eligible						4	
Ongoing Enrolled Employees - Trending Not Eligible						5	
Employees Likely to be Eligible as of Annual Enrollment						6	
<b>Employees Measured to be Eligible for Annual Enrollment</b>						7	
Full Eligibility Status						10	
Currently Enrolled Employees not ACA Eligible						11	
Secondary Compliance Information						11	
Initial Measurement Period with Change in LNAF Status						13	
<b>Affordability Reports</b>							
Employees Enrolled in Lowest Cost MV Plan (Affordable)						0	

*Images are examples and for information purposes only. They may vary across platforms and are subject to change.*

2. Click the **Run Annual Enrollment** button.

**Employees Measured to be Eligible for Annual Enrollment**

**Report Description**  
Employees Measured to be Eligible for Annual Enrollment

**Report Information**  
This report may require more information and/or you may need to select filters. Click the Run Report button to export the report content.

Select the date of the historical Annual Enrollment report you want to view (displaying last 18 months of execution).

Run this report for the following hierarchy Level:

☒ for the following hierarchy step:  
☐ for each hierarchy step in a zip file

Show all employees measured or estimated to be ACA eligible as of

Custom Column 1

Custom Column 2

Custom Column 3

☒ Include employees measured over their initial measurement period

☒ Include FT new hire employees

☒ Include new employees not measured over standard measurement who are trending eligible before the as of date

☒ Include non ACA eligible employees

☒ Include employees measured under a monthly measurement rule who are ACA eligible in the last accepted month

☐ Mask SSN/TIN

**Parameter Notes**  
None

**RUN REPORT**

**RUN ANNUAL ENROLLMENT**

3. Select the check boxes for *Run the annual enrollment process to determine ACA eligibility for my ongoing population* and *Generate Forms 1095 once the annual enrollment process and reanalysis have completed*.

4. Click the **Run** button.

**Note:** This report often takes 24 hours to complete, so please return after that time to complete the remaining steps.

5. Once the report is available, the report can be accessed on the **Reports** page.

**Run Annual Enrollment**

**Annual enrollment process**

You must ensure that all the payroll files contain the complete hours employees worked within the standard measurement period you select when you run the annual enrollment process.

The annual enrollment process calculates monthly average hours and then makes eligibility decisions, which are stored in the system. Eligibility decisions define your ongoing employee population's ACA eligibility for the following stability period.

Once the process is complete, run the Employees Measured to be Eligible for Annual Enrollment report to see the eligibility decisions.

**Troubleshooting Missing, Incorrect, or Additional Hours**

If you find there are missing, incorrect, or additional hours that should have been included in the measurement period you selected, you can re-run the annual enrollment process after you have sent updated files. Re-run the annual enrollment process once these files have been accepted to update the eligibility decisions.

For the measurement period that ends on

☒ Run the annual enrollment process to determine ACA eligibility for my ongoing population.

☒ Generate Forms 1095 once the annual enrollment process and reanalysis have completed.

**RUN**

6. Return to the **Employees Measured to be Eligible for Annual Enrollment** and click the blue icon to access the **ACA Decision report**.

Health e fx Enterprise

Group: Admin Welcome Admin

My Tasks | Employee Details | Dashboard | HR Insights | File Import | **Reports** | Submissions

☆ Reports

Eligibility / Affordability	Measurement / Stability	Demographics	Data / Alert Management	Audits	Print/Transmission	Analytics	Communications
<b>Eligible Population based on hours worked per week</b>							
	Eligible Employees with No Plan Offer					0	
	New Hires in Measurement - Not Offered Coverage - Trending Eligible					1	
	Newly Eligible Employees					2	
	Newly Ineligible Employees					3	
	Employees in Standard Measurement - Trending Eligible					4	
	Ongoing Enrolled Employees - Trending Not Eligible					5	
	Employees Likely to be Eligible as of Annual Enrollment					6	
	<b>Employees Measured to be Eligible for Annual Enrollment</b>					7	
	Full Eligibility Status					10	
	Currently Enrolled Employees not ACA Eligible					11	
	Secondary Compliance Information					11	
	Initial Measurement Period with Change in LNAF Status					13	
<b>Affordability Reports</b>							
	Employees Enrolled in Lowest Cost MV Plan (Affordable)					0	

SAVE ORDER

7. Check all the boxes and then select the **Run Report** button.

**Note:** Reports that use the SSN as the employee identifier will automatically have the SSN masked by the system. Individual users may be set up to unmask the SSN by turning on the Multi Factor Authentication (MFA) within the system (see User Guide, pg 86-87).

**Employees Measured to be Eligible for Annual Enrollment**

Report Description  
Employees Measured to be Eligible for Annual Enrollment

**RUN ANNUAL ENROLLMENT**

Report Information  
This report may require more information and/or you may need to select filters. Click the Run Report button to export the report content.

Select the date of the historical Annual Enrollment report you want to view (displaying last 18 months of execution).  
[01/01/2024]

Run this report for the following hierarchy Level: [National]  
for the following hierarchy step:  
for each hierarchy step in a zip file  
[National]

Show all employees measured or estimated to be ACA eligible as of [01/01/2024]

Custom Column 1  
Please select a custom column

Custom Column 2  
Please select a custom column

Custom Column 3  
Please select a custom column

☒ include employees measured over their initial measurement period  
☒ include FT new hire employees  
☒ include new employees not measured over standard measurement who are trending eligible before the as of date  
☒ include non ACA eligible employees  
☒ include employees measured under a monthly measurement rule who are ACA eligible in the last accepted month

☐ Mask SSN/TIN

Parameter Notes  
None

**RUN REPORT**

## Reading the Report

The report includes employee average hours over the measurement period, as well as their Stability Start and Stability End date. These employees are identified on the report as follows:

- **Standard Measurement:** These employees have been measured ACA eligible over the latest standard measurement period.
- **Initial Measurement:** These employees have been determined to be eligible after their initial measurement period and have a stability period that includes the “As Of” date used to run the Annual Enrollment report.
- **FT New Hires:** These are new hires in a look-back group who are measured at the end of each month until the start of their first stability period.
- **Initial Trending:** These employees are near the end of their initial measurement period, are trending eligible, and their initial stability period is at the same time as the “As Of” date you selected.
- **Not Eligible:** Any employee who has not measured or is not trending ACA eligible.
- **Monthly Measurement:** These employees fall under a monthly measurement rule, are always measured monthly, and have measured ACA eligible in the last month that was accepted.

**Note:** There may be a subset of employees that will appear in more than one (1) category, depending on when their initial decision and first stability decision is determined.

## 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.*