

Client Training HQ



Annual Enrollment Report

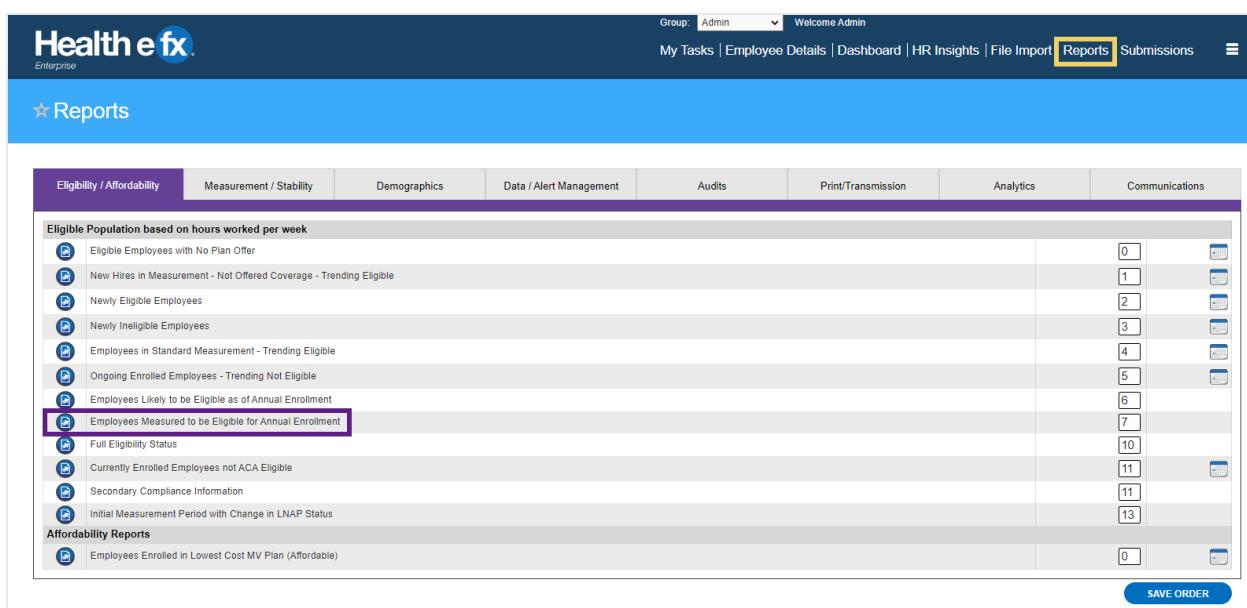
We know you put a lot of effort into preparing for Annual Enrollment each year. The Health e(fx) Annual Enrollment (AE) report provides eligibility information to simplify the process of offering annual benefits to your ACA eligible employee population.

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**.



The screenshot shows the Health e(fx) software interface. At the top, there is a navigation bar with the Health e(fx) logo, a dropdown for 'Group' (set to 'Admin'), and a 'Welcome Admin' message. To the right of the group dropdown are links for 'My Tasks', 'Employee Details', 'Dashboard', 'HR Insights', 'File Import', 'Reports' (which is highlighted with a yellow box), 'Submissions', and a three-dot menu. Below the navigation is a blue header bar with the text '★ Reports'. The main content area has a purple header bar with tabs for 'Eligibility / Affordability', 'Measurement / Stability', 'Demographics', 'Data / Alert Management', 'Audits', 'Print/Transmission', 'Analytics', and 'Communications'. Under the 'Eligibility / Affordability' tab, there is a table with rows for various employee status categories. The row for 'Employees Measured to be Eligible for Annual Enrollment' is highlighted with a purple box. The table includes columns for the status name, a blue icon, a numerical value, and a small calendar icon. At the bottom right of the table is a blue 'SAVE ORDER' button.

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

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**.

Category	Count	Action
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	
Employees Measured to be Eligible for Annual Enrollment	7	Run Report
Full Eligibility Status	10	
Currently Enrolled Employees not ACA Eligible	11	
Secondary Compliance Information	11	
Initial Measurement Period with Change in LNAP Status	13	
Affordability Reports	0	Run Report
Employees Enrolled in Lowest Cost MV Plan (Affordable)	0	

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).

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**

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.