EQUIFAX

Client Training HQ

Worxtime ACA Timeline

Overview

This document overviews the preferred cadence for various action items within the Worxtime solution.

> ***Note:*** Functionality of the Worxtime solution may be dependent upon the completion of various action items.

Each Pay Period	
Upload Employee Demographics (EE)	Uploading an Employee Demographics file helps ensure that employees are captured in Worxtime, which will limit discrepancies such as “EIN Not Found.” The Employee file needs to be uploaded prior to uploading TImesheet files. ***Note:*** Timesheet files are only used by our tracking clients.
For Tracking Clients: Upload Timesheet Files (HRS)	Uploading current payroll information allows nearly real-time, live tracking of hours for employees and helps ensure more accurate eligibility statuses. This is especially helpful when tracking the hours of variable hour employees who may become eligible for benefits at the end of their Measurement Period based on hours worked. Keep in mind that when you have unresolved hour discrepancies, those hours are not added to the total hours for that given employee. If you do not resolve timesheet discrepancies, your reports may be inaccurate.
Check Alerts	Different alerts can be set to notify you about a variety of occurrences, so it is important to carefully monitor any alerts you receive. For example, you may set up alerts that automatically trigger when an employee becomes eligible for benefits or enters the Administrative Period.
Resolve Discrepencies	Discrepancies need to be resolved between file uploads to help ensure accurate system reporting. Being proactive in resolving discrepancies helps alleviate the need to resolve a large number of discrepancies during a critical time such as the end of the year. Failure to resolve discrepancies will cause delays for year-end processes. For instance, you cannot certify your Audit Wizard, mail Forms 1095–C using our system, or e-file to the IRS unless all discrepancies are resolved.
Review Dashboard Information	The dashboard provides a nearly instant, real-time overview of employees’ eligibility. It is important to monitor variable hour employee eligibility to help determine if coverage needs to be offered. The dashboard also allows you to more easily identify if employees are in their Measurement, Administrative, or Stability Period.

Monthly	
Upload Coverage Files	The ACA requires that employers offer coverage to at least 95% of eligible employees. Once this year's current rules are set and monthly coverage files are being uploaded, you will be able to properly track employees and offer coverage at the correct time. At this point, you will also be able to run the Company 1094-C Minimum Essential Coverage Report, which can help to greatly reduce your liability for an IRS Penalty A.
Annually	
1094/5-C Rule Set Review	You need to confirm and update various information in the Worxtime system for this year's reporting as soon as possible. One of the most important updates are your rule sets, which you need to update before you can begin fully using the system. If you have not updated your rule sets, please contact your Worxtime Support Analyst, and they will walk you step-by-step through the process.
As Desired	
Run Reports	Standard reports can be viewed or exported into an Excel or CSV spreadsheet, which allows you to filter and sort data. Both custom and standard reports can be scheduled to run automatically on a daily, weekly, bi-weekly, or monthly basis and sent to a specific list of email addresses.

More Training Available!

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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.