Client Training HQ

Quarter 4 (October-December) ACA HFX Action Items (for Calendar Year Plans)

Your Responsibility as an ACA Administrator or User:

Equifax® recommends that administrators and/or users of the ACA product routinely monitor their instance for data currency, data quality, and eligibility review. The following Q4 checklist can provide efficient tracking and ensure a more positive 1094-C and 1095-C reporting season.

Top Q4 Priorities (click items 1 through 5 to move to the specific item):

1. **Data Currency and Quality** on a monthly basis for the current calendar year.
2. **Review Compliance Dashboard** for the current calendar year.
3. **Review Form Alerts** for the current calendar year.
4. **Verify FEINs and Controlled Groups** that will be reported to the IRS.
5. **State Reporting Configuration** for the current calendar year.

Listed below are additional items for review:

	Event	Action
☐	**User Manager Access Review** ***(Review Quarterly)***	Review **Settings > User Manager > User Manager** to add, edit, and remove users, as needed.

	Event	Action
☐	**Data Currency and Quality** ***(Review Monthly; Refer to the Managing Monthly Responsibilities job aide for further instructions)***	Review **File Import > File Uploads** to help ensure expected monthly and annual files for the reporting year have been received. Confirm Source and File Alerts (critical and non-critical) have been reviewed and resolved. **Note:** All files required to complete ACA reporting for the current tax year are due by **January 5**.
☐	**Confirm All Plan Manager Details for Current Reporting Year are Loaded and Validated** ***(Complete Annually, as medical plans renew and data for new plans is reported in files. Does not apply to ACA Starter product).***	Confirm that the Plan Manager(s) (**Settings > Company Settings > Plan Manager**) for the current year have been loaded and validated by Quality Assurance. Ensure all plans have been accounted for, appropriate costs are present in Line 15 of Forms 1095 for Lowest Cost Monthly Premium, and no 1Fs are present. Refer to the 1095-C Code Report (**Reports > Audits > 1095-C Codes**) to review each employees' Form 1095 details.
☐	**Review Compliance Dashboard** ***(Review Monthly; Refer to the Managing Monthly Responsibilities job aid for further instructions)***	Review **Dashboard** to confirm compliance for Penalty A and Penalty B. Ensure all FEINs are above 95% for Penalty A. Review and resolve any employees posing risk for Penalty B.
☐	**Review Missing Offers of Coverage Corrections (MOCC) Page** ***(Review Monthly; Refer to the Managing Monthly Responsibilities job aide for further instructions)***	Review and modify employees who are posing risk for Penalty A and Penalty B. Impacted employees have been measured eligible for coverage, per ACA, but have not been reported with an offer of coverage in the source file.

	Event	Action
☐	**Confirm Annual Enrollment Report has been run** ***(Varies based on Measurement Rules, Annually or As Required; Refer to the Annual Enrollment Report Overview for further instructions; Applies to Advanced/Enterprise ACA products only).***	Complete the Annual Enrollment Report for all impacted periods to help you ensure more accurate ACA eligibility decisions for current and ongoing reporting. This impacts accurate code combinations in Line 14 and Line 16 of an employee's Form 1095, as well as for Penalty A and Penalty B. ***Note:*** If the most recent Annual Enrollment Report does not include Standard Eligibility Decisions, Annual Enrollment was likely not completed. If assistance is required, contact Support.
☐	**Verify FEINs and Controlled Groups** ***(Review Quarterly)***	Review **FEIN Settings** in **Settings > Company Settings > Company Information** to help ensure all FEINs are accounted for and configured with accurate reporting status, contact and control group information. Add additional ALE Members under **Add ALEM** for FEINs that are not reported via the source files in the existing platform to help ensure accurate reporting in Part IV of Form 1094.
☐	**Union Mappings** ***(Review Annually)***	Review **Settings > Company Settings > Census Mapping > Union Code Mapping** to confirm Union Code Mappings are correct for the current Tax Year, with appropriate **Multi-Employer Unions** indicated. Contact Support to regenerate forms if any changes are made.
☐	**State Reporting Configuration** ***(Review Annually)***	Review **Settings > Company Settings > Census Mapping > State Settings** and confirm State Reporting is Active (YES) for applicable states where there is an impacted employee population. Contact the Account Executive for needed changes.
☐	**Review Form Alerts** ***(Review Monthly, October - December)***	To better ensure successful form furnishment to employees, review **File Import > Form Alerts** to confirm issues impacting a Form 1095 have been resolved. These include, but are not limited to, invalid Line 14 and Line 16 code combinations, duplicate or invalid SSNs, and inaccurate address information.

	Event	Action
☐	**Confirm Employee Portal is Active** ***(If applicable, review annually)***	If you have opted to offer Employee Portal (electronic delivery of Forms 1095) to employees, confirm all settings are as expected. Confirm that the URL is active and functioning. Contact Support if logo or color schematics require updates. Notify employees that they must consent to electronic delivery of their forms by **December 31**st in order to receive an electronic copy versus a mailed copy.
☐	**Update Plan Manager for Upcoming Plan Year** ***(Specifically for medical plans that renew Q1; Does not apply to ACA Starter product)***	Update your medical plans in Plan Manager for plans renewing in Quarter 1. This allows data validation and quality assurance to be completed as soon as **one month of data** has been accepted in the new plan year.
☐	**Register for Connections**	**Connections** provides live and on-demand training to help you optimize your understanding of the ACA management solution. Complete your registration to review and complete tutorials specific to upcoming ACA Reporting Season activities. ● Reporting Tool Kit: Guide to Filing Your 1094s and 1095s

Need additional Support?

Should you have any questions regarding completion of any or all of these action items, please do not hesitate to contact us at **support@healthefx.us** or 888.963.9174.

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.