



UKG Ready™ ACA Manager 2021 Reporting Checklist





UKG Ready: ACA Manager 2021 Reporting Checklist

Overview

The first required filings of the Affordable Care Act (ACA) forms generated a variety of product enhancements that will enable UKG to better support customer needs surrounding ACA requirements. Many updates have been made to ACA reporting requirements, the UKG Ready solution, and the IRS policy as well. Following the checklist steps below will help ensure that you have laid the groundwork for the most accurate 2021 ACA reporting.



These six checklists can be used to guide completions of your required Affordable Care Act reports for each Applicable Larger Employer. These checklists should be completed prior to running the 1095-C process for 2021.

Checklist 1: Healthcare Plans

Admin > Profiles/Policies > Benefits > Plans

It is important to ensure that all your medical plans are properly set up in UKG Ready because the ACA Manager product module must reference the correct plans when evaluating each employee.

← Edit Plan

SAVE | UPLOAD DOCUMENT | ADD RULES | ADD NOTE

Benefit Plan

Benefit Type: Medical
Name: Simple EE
Description: [Empty]
Active:
Certificate #: [Empty]
Policy #: [Empty]
Effective From: 01/01/2016 To: 12/31/9999
Eligibility Filter: All Accounts
ACA Eligibility Filter: All Accounts
COBRA Eligible:
Coverage Provided through End of Term Month:
Plan is Self-insured:
Override Benefit Effective Date: [Empty]
Vendor: [Empty]
Custom Form: [Empty]

EDU SETTINGS

Require Evidence of Insurability for Open Enrollment:
Require Evidence of Insurability for New Hire Enrollment:
Require Evidence of Insurability for Life Change Event:

DEDUCTION/EARNING #1

Coverage Type: Premium
Description: [Empty]
Earning/Deduction: HS Medical System ID: DEDUCTION_50465598
Earning/Deduction Starts On: 0 Day(s) Before Employee Benefit Start Date
Employee Frequency: Every Scheduled Pay
Employer Frequency: Every Scheduled Pay

Coverage Levels

Premium Amounts should always be entered as a monthly amount. The system will convert the monthly premium to the proper earning/deduction amount based on the frequency in the employer's pay period profile.

#1
Coverage Name: EE Only
Brief Explanation: [View/Edit Brief Explanation]
Eligibility Filter: [Empty]
ACA Eligibility Filter: [Empty]

EDU SETTINGS

Require Evidence of Insurability for Open Enrollment:
Require Evidence of Insurability for New Hire Enrollment:
Require Evidence of Insurability for Life Change Event:

PRICING (PREMIUM)

#1
\$200.00 (ER: \$100.00 / EE: \$100.00) 12/31/1800

Custom Field Settings

Define Fields

Earning Deduction Audit

[Empty]

ACA Settings

Offered To: Min Essential Coverage Providing Minimum Value Conditional Offer

Employee	Yes	Yes
Spouse	No	No
Dependent(s)	No	No



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Checklist 1: Healthcare Plans

Benefit Type	Completed?
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The ACA Manager looks to those benefit plans marked as Base Type = Health when determining affordability and coverage offered, and evaluating which Line 14 code to use in Part II of Form 1095-C.

Click on the blue hyperlink OR [Admin > Profiles/Policies > Benefits > Types](#)

Open each type to ensure that:

- Your medical benefit type shows as Base Type = Health
- All other plans do not reflect Base Type = Health*

**If you have another Benefit Base Type = Health, please contact Global Support at your earliest convenience, as this may affect ACA and Payroll processes.*

[← Edit Type](#)

Benefit Type

Name*

Base Type

Plan Type

Description

ESS Group Name

ESS Employer Provided

Third Party Administrator

COMPARISON FEATURES

No Features Defined

ADD FEATURE

GTLI INCOME ⓘ



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Checklist 1: Healthcare Plans

Effective From and Effective To Dates

Completed?

The ACA Manager looks to those benefit plans aligned with Base Type = Health that are active within the reporting year.

Ensure that these dates are reflecting correctly for each of your medical plans.

Benefit Plan

Benefit Type Medical

Name* Simple EE

Description

Active

Certificate #

Policy #

Effective From* 01/01/2016 To 12/31/9999

Eligibility Filter All Accounts

Eligibility Filter

ACA Manager will look to the general Eligibility Filter to determine which plan(s) each employee is eligible to enroll in.

Click on the magnifying glass icon at the end of the field to ensure that this filter is set up to only offer this plan to those eligible employees.

Benefit Plan

Benefit Type Medical

Name* Simple EE

Description

Active

Certificate #

Policy #

Effective From* 01/01/2016 To 12/31/9999

Eligibility Filter All Accounts



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Checklist 1: Healthcare Plans

Coverage Provided Through End of Term Month

Completed?

Only for customers with the UKG Ready HR module installed

Checking this box indicates that if an employee should term prior to the end of the month, the offer of coverage and enrollment (if the employee is enrolled in the plan) will extend to the end of the termination month.

If you need to adjust your benefit plan(s), be mindful of the effective dates before saving.

[← Edit Plan](#)

Benefit Plan

Benefit Type

Name*

Description

Active

Certificate #

Policy #

Effective From* **To**

Eligibility Filter

ACA Eligibility Filter

COBRA Eligible

Coverage Provided through End of Term Month



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Checklist 1: Healthcare Plans

Optional Step

Completed?

This step can be skipped if there are no healthcare plans that provide coverage through the end of the termination month.

In order for the system to properly end-date plans marked as such, the Benefit Coverage End Date Field should be enabled.

If Coverage Provided Through End of Term Month is checked on any medical plans, navigate to **Admin > Global Setup > Company Setup** and go to the HR tab.

Ensure the Benefit Coverage End Date box is checked in the Termination Details section. If it is not, please check and save.

← Company Setup

The screenshot shows the 'HR Settings' page in the UKG system. The 'TERMINATION DETAILS' section is expanded, showing various checkboxes for termination actions. The 'Benefit Coverage End Date' checkbox is checked. A yellow warning banner at the bottom states: 'The termination detail items must be manually added to HR action in order for them to be used in the action - Exit Interview and Asset Removal are currently not available in HR actions.'

Field	Checked
Treat Pay Grade Violation As	Warning
Manager To Use For Organization Chart Generation	Manager 1
Manager To Use For Compensation Trees	
Document Type Required	<input type="checkbox"/>
Bypass HR action For	<input type="checkbox"/>
Use HR action for Hire	<input type="checkbox"/>
Use HR action for Re-Hire	<input type="checkbox"/>
Use HR action for Terminate	<input type="checkbox"/>
Disable External Verify for I9	<input type="checkbox"/>
I9 Document Upload Required	<input type="checkbox"/>
HIRE/REHIRE	
Error If Not Rehireable	<input type="checkbox"/>
TERMINATION DETAILS	
Reason Displayed	<input checked="" type="checkbox"/>
Reason Required	<input type="checkbox"/>
Re-Hireable	<input checked="" type="checkbox"/>
Benefits Deduction/Earnings End Date	<input type="checkbox"/>
Manager Displayed	<input type="checkbox"/>
Reason Required	<input type="checkbox"/>
Notice	<input type="checkbox"/>
Benefit Coverage End Date	<input checked="" type="checkbox"/>
Notes Displayed	<input checked="" type="checkbox"/>
Reason Required	<input type="checkbox"/>
Asset Removal	<input type="checkbox"/>
Deduction End Date	<input type="checkbox"/>
Personal Email Displayed	<input type="checkbox"/>
Reason Required	<input type="checkbox"/>
Exit Interview	<input type="checkbox"/>
Direct Deposit End Date	<input type="checkbox"/>
Cell Phone Displayed	<input type="checkbox"/>
Reason Required	<input type="checkbox"/>
Earning End Date	<input type="checkbox"/>



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Checklist 1: Healthcare Plans

Plan Is Self-Insured

Completed?

If a particular healthcare plan is self-insured, Part III of Form 1095-C will need to be populated for each employee, identifying who was enrolled and when they were enrolled.

Check this box if the plan selected is self-insured (this can be confirmed with your benefit carrier/provider) and ensure that the effective dates on the plan are correct.

If none of your plans are self-insured, no action is required with this step.

[← Edit Plan](#)

Benefit Plan

Benefit Type

Name*

Description

Active

Certificate #

Policy #

Effective From* **To**

Eligibility Filter

ACA Eligibility Filter

COBRA Eligible

Coverage Provided through End of Term Month

Plan Is Self-insured



UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 1: Healthcare Plans

Coverage Levels

Completed?

Coverage Levels determine the amount that the employee and employer pay, as well as the level of coverage the employee has (i.e., employee only, employee plus spouse, family)

The IRS has specified that though it is compliant to charge different premiums to employees based on tobacco use, all employees must be treated as non-smokers when determining affordability and/or reporting an amount in Line 15 in Part II of Form 1095-C. The ACA Eligibility Filter has been added to accomplish this.

Ensure that the pricing accurately reflects the current year's premiums.

The screenshot shows the 'Coverage Levels' configuration interface. At the top, a yellow warning banner states: 'Premium Amounts should always be entered as a monthly amount. The system will convert the monthly premium to the proper earning/deduction amount based on the frequency in the employee's pay period profile.' Below this, a list of coverage levels is shown, with the first entry selected. The entry details are: Coverage Name: 'EE Only', Brief Explanation: '[View/Edit Brief Explanation]', Eligibility Filter: (empty), and ACA Eligibility Filter: (empty). Under 'EOI SETTINGS', three checkboxes are present: 'Require Evidence of Insurability for Open Enrollment' (unchecked), 'Require Evidence of Insurability for New Hire Enrollment' (unchecked), and 'Require Evidence of Insurability for Life Change Event' (unchecked). The 'PRICING (PREMIUM)' section shows a list with one entry: '#1' with a price of '\$200.00 (ER: \$100.00 / EE: \$100.00)' and an effective date of '12/31/1900'.



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Checklist 1: Healthcare Plans

ACA Settings

Completed?

The ACA Settings widget on the Benefit Plan allows you to specify which plans provide Minimum Essential Coverage and Minimum Value, and the level at which they are provided (please consult with your benefits carrier/provider if you have questions about your plan).

The 2016 Form 1095-C introduced two new Line 14 codes pertaining to a conditional offer of coverage made to a spouse. Your benefits carrier/provider can assist you in determining whether your medical plan(s) have conditional offers.

Tip: While in UKG Ready, hover over the informational icon for a description of the conditional offer.

ACA Settings

Offered To: **Min Essential Coverage** **Providing Minimum Value** **Conditional Offer**

Employee	<input type="button" value="Yes"/>	<input type="button" value="Yes"/>	
Spouse	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/> ⓘ
Dependent(s)	<input type="button" value="No"/>	<input type="button" value="No"/>	



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Checklist 2: Benefit Profiles

Admin > Profiles/Policies > Benefits > Profiles

Ensure that each Benefit Profile lists the appropriate healthcare plans.

ACA Manager will only look at the healthcare plans attached to the particular Benefit Profile assigned to the employee

Medical

Brief Explanation [\[View/Edit Brief Explanation\]](#)

Auto Add

Use Waived Reason

Employee Can Select Up To Plan(s), At Least Plan(s) Should Be Selected

Show On Life Change Event New Employee

	PLAN NAME	EFFECTIVE FROM	EFFECTIVE TO	EARNING/DEDUCTION
	Age Banded	01/01/2015	12/31/9999	HS Medical
	MVP Plan	01/01/2015	12/31/9999	HS Medical
	PPO	01/01/2015	12/31/9999	HS Medical

ACA Settings

Completed?

Informational

This widget pertains to some of the forms of transitional relief that were available in 2015 reporting. This Transition Relief is no longer available, and this box can be ignored.

ACA Settings

Has Non Calendar Year Plans

Has Non Calendar Year Transition Relief

Eligible For All Full Time Employees

Only For Employees Eligible For Coverage As Of 2/9/2014



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Checklist 3: ACA Profiles

Admin > Profiles/Policies > ACA (Affordable Care Act) > ACA Profiles

The ACA Profiles are assigned on a per-employee basis and tell the system everything it needs to know about measuring and reporting for each employee – whether hours need to be measured or not, where to look for the hours, what qualifies as ACA Full Time, what qualifies as affordable for that year, etc.

[← Edit ACA Profile](#)

ACA Profile

Name*

Description

Active

Company Qualifies for MultiEmployer Interim Rule Relief

NON-EMPLOYEES

INTERNATIONAL EMPLOYEES

AUTO RUN

Run Days After Month End

NON-VARIABLE HOURS EMPLOYEE (EXPECTED TO WORK MORE THAN 30 HOURS PER WEEK, 130 HOURS PER MONTH)

First Month Cutoff Day

Initial Measurement Configuration

Measurement Period Months

Administrative Period Months

Stability Period Months

Break In Service Configuration

Apply Break In Service Rules

Break In Service Considered New Hired Weeks

Apply Rule Of Parity

First Day Of Work

If Rehire Date Is Empty, First Day Of Work



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Checklist 3: ACA Profiles

Company Qualifies for Multiemployer Interim Rule Relief

Completed?

This checkbox is used to automatically assign the Line 14 and Line 16 codes in Part II of Form 1095-C associated with the Multiemployer Interim Rule Relief.

This should be used if your employees enroll in healthcare coverage via another employer (for example, if your union employees enroll in healthcare coverage directly with the union, but you administer their premiums).

Please contact your benefits carrier/provider if you have any questions as to whether this should be selected or not.

Break in Service

ACA law states that if an employee terminates and re-hires within 13 weeks of the termination date, they are not considered a new hire for ACA purposes and should continue in the same measurement and stability periods in which they were assigned when the termination occurred. (Please note that the 13-week mark is extended to 26 weeks for educational employees). If the break is longer than 13 weeks, the employee starts fresh as if newly hired.

If Apply Break In Service Rules is checked, the dates section should first reflect the re-hire date and then reflect the appropriate date for your organization.

Tip: If Break In Service is enabled, the best practice is to recalculate the ACA Timeline either after the termination has been entered in UKG Ready or prior to entering the re-hire into the system.

First Day Of Work Rehire Date

If Rehire Date Is Empty, First Day Of Work Hire Date

Apply Rule of Parity

The rule of parity requires looking at the employment period before the break in service when determining the re-hire/new hire ACA status for the employee. If the employee's prior period of employment was less than the break in service, the employees will be considered an ACA new hire.

If this box is checked, the rule of parity will be applied when any breaks in service are calculated.

Please note that checking this box is not required – the ACA laws state that it is truly the Applicable Large Employer's choice as to whether or not you use this rule.



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Checklist 3: ACA Profiles

Affordable Plan Offered Rule

Completed?

The IRS publishes a standard percentage each year that employers use when determining if the healthcare plan is affordable. The affordability rate is set to 9.83%, effective 01/01/2021. Ensure that your Affordable Plan Offered reflects this rate.

Affordable Plan Offered

Effective From 01/01/2021 To 12/31/2021

If At Least One Is True:

- Plan Monthly Cost \leq 9.83% Federal Poverty Line / 12
- Plan Monthly Cost \leq 9.83% Hourly Rate * 130.0
- Plan Monthly Cost \leq 9.83% Monthly Salary

1095-C Line Rules

All of these rules will be required in order for the correct codes for Line 14 and Line 16 – as well as the correct amounts for Line 15 – to be reported in Part II of Forms 1095-C. Ensure that all three 1095-C Line rules exist in each ACA profile, and also ensure that each rule is not set up with any Effective Dates.

1095-C Line 14 Codes (Series 1)

1095-C Line 14 Codes (Series 1), System Id: 18685442

1095-C Line 15 (Employee Only Lowest Cost)

1095-C Line 15 (Employee Only Lowest Cost), System Id: 18690050

1095-C Line 16 Codes (Series 2)

1095-C Line 16 Codes (Series 2), System Id: 18686210



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Checklist 3: ACA Profiles

Limited Non-Assessment Period

Completed?

The Limited Non-Assessment Period is the time frame that the IRS allows an employer to wait when offering healthcare coverage to an employee without the employer being penalized. For example, many employers have a mandatory waiting period for any new hires. Employers require that new hires wait until the first of the month after “x” days to be offered healthcare benefits. Ensure the Limited Non-Assessment Period rule exists in each ACA Profile.

 Limited Non Assessment Period



Limited Non Assessment Period, System Id: 18708482



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Checklist 4: Employee Information

My Team > Employee Information

ACA Manager will also look to certain information in the employee's record.

Benefit Profile

Completed?

The Benefit Profile assigned to the employee will direct ACA Manager to the appropriate plan when determining which plan should be used for ACA reporting. For example, if you have three medical plans and the Benefit Profile assigned to one employee only has two listed, ACA Manager will not consider the third plan at all when evaluating that employee.

Ensure every employee who is eligible for benefits has a Benefit Profile attached.

Tip: An easy way to accomplish this step is to add the column labeled Current Benefit Profile (Effective) to your Employee Information Report.

Benefit Profile configuration form showing:

- Benefit: Benefit Plans - 45 Days
- Effective Date: 12/31/1900
- + Add button

Benefit Profile Effective Dates

This tells the system when the Benefit Profile should be applied to the employee. Be mindful of this date, because if it falls prior to the actual date that the employee was truly eligible for benefits, this may affect ACA reporting.

Ensure that every employee with an attached Benefit Profile reflects the correct effective date.

Examples: Find out whether someone has a Benefit Profile assigned prior to their hire date; find out whether someone has a Benefit Profile aligned with the hire date but there is a 30-day waiting period.

Tip: An easy way to accomplish this step is to add the column labeled Benefit Profile (Effective Date From) to your Employee Information Report.

Plan Name	Coverage Level	Deduction Effective From	Deduction Effective To	Coverage Effective From	Coverage Effective To	Notes	Documents	Actions
AFLAC STD	Short Term Disability	10/01/2020	12/31/2099	10/01/2020	12/31/2099			...
Blue Cross Blue Shield	Employee Only	10/01/2020	12/31/2209	10/01/2020	12/31/2209			...
Delta Dental	Employee Only	10/01/2020	12/31/2209	10/01/2020	12/31/2209			...
Hartford Basic Life	Basic Life	10/01/2020	12/31/2099	10/01/2020	12/31/2099			...
MetLife LTD	Long Term Disability	10/01/2020	12/31/2099	10/01/2020	12/31/2099			...



UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 4: Employee Information

ACA Profile

Completed?

When ACA Manager looks at the ACA Profile assigned to the employee, ACA Manager can determine what to evaluate and how to report. Ensure that every employee who should be included in the Form 1094-C employee counts has an ACA Profile attached.

Tip: An easy way to accomplish this step is to add the column labeled Current ACA Profile (Effective) to your Employee Information Report. Once on the employee's profile, navigate to the ACA Timeline Overview widget and select Manage Employee's ACA Timeline.

The screenshot shows two parts of the ACA Manager interface. The top part is the 'ACA Timeline Overview' widget, which includes a header with a dropdown arrow and a 'Manage Employee's ACA Timeline' link. Below the header is a blue information bar stating 'ACA Data Not Supported Prior To 01/01/2018'. Underneath, it shows 'Last Calculated: 10/03/2021 03:59 am' and a 'Date Range: 04/01/2021 - 10/01/2021' dropdown. A table below has columns for 'ACA Profile', 'ACA', 'Effective Date', and '01/01/2012'. The bottom part of the screenshot is the 'ACA Profile' form, which has a text input field for 'ACA Profile' containing 'ACA' and a date input field for 'Effective Date' containing '01/01/2012'. There is a '+ Add' button below the form.

Employees Status Change History Widget

This widget stores all of the employee's action dates (hired, terminated, and re-hired), and the system looks to this when determining which codes to use on Form 1095-C.

If there are any questions regarding break in service calculations, please refer to this widget first. If the employee has any of the following, manual corrections will be needed:

- Two consecutive re-hire dates without a termination date between the two
- Two consecutive termination dates without a re-hire date between the two
- A re-hire date without any corresponding termination date prior

If you notice a date missing for an employee, please add it here and then navigate to **Team > Benefits > ACA > Employee ACA Actions**. Select that same employee and then select Recalculate Status Change from the ellipsis.



UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 4: Employee Information

Employee Benefit Plans

Completed?

ACA Manager looks here to see whether the employee is enrolled in coverage, or to see if a record exists that indicates the employee was offered coverage but waived enrollment. (Best practice suggestion: Always enter waive records to easily show that coverage was indeed offered, even though the employee declined enrollment.) Ensure that Coverage Effective From and Coverage Effective To dates are reflecting accurately for employees.

Tip: An easy way to accomplish this step is to use the report found at **Team > Benefits > Benefit Plans**

The screenshot displays the 'Employee Benefit Plan' configuration page. It includes fields for 'Benefit Plan Effective From' (01/01/2015) and 'Benefit Plan Effective To' (12/31/9999). Below these are 'Deduction #1 Effective From' (01/01/2015) and 'Deduction #1 Effective To' (12/31/9999). Further down are 'Coverage Effective From' (01/01/2015) and 'Coverage Effective To' (12/31/9999). The 'Earnings, Deductions & Coverage Amounts' section shows 'Employee Earning/Deduction 1' with an amount of \$62.50 and a frequency of 'Every Scheduled Pay' (with a checked 'Block Last (3rd or 5th)' option). Below that, 'Employer Earning/Deduction 1' is set to \$75.00.

ACA Timeline

The ACA Timeline is a month-by-month account for each employee that shows where they stand in the current lookback period, identifies active compliance alerts, shows the user what will be reported in Lines 14-16 in Part II of Form 1095-C, etc.

Ensure hours for variable employees are inputted on a month-by-month basis for proper calculation of average hours worked per month.

Tip: An easy way to accomplish this step is to use the ACA Data Detailed report.



UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 4: Employee Information

Dependents/Beneficiaries Enrollment

Completed?

OPTIONAL STEP — can be skipped if no plans are self-insured

If the employee is enrolled in a self-insured medical plan, Part III of Form 1095-C must be filled out to identify who was enrolled and for which months. This identification includes the employee, and anyone included on their plan.

If you have a self-insured healthcare plan, ensure that the Effective From and Effective To dates are reflecting accurately for anyone enrolled in the employee's plan in 2021.

Tip: An easy way to accomplish this step is to use the report found at **Team > Benefits > Dependents**

Dependents/Beneficiaries					
Identify Spouse		Identify Children			
Yes, Required		No			
Identify Beneficiaries		Identify Contingent Beneficiaries			
No		No			
Spouse					
Page 1 of 1 1 - 1 of 1 Rows					
Name	Relationship	Birth Date	Effective From	Effective To	Actions
Cornelius Fudge	Spouse	07/01/1955	08/01/2015	12/31/9999	...

Dependents/Beneficiaries Demographics

OPTIONAL STEP — can be skipped if no plans are self-insured

Part III of Form 1095-C requires a name as well as either a Social Security number (preferred) or date of birth (only to be populated if the SSN is not available) for every individual enrolled in the employee's plan.

If you have a self-insured healthcare plan, ensure that the Social Security number and/or date of birth is reflecting accurately for anyone enrolled in the employee's plan in 2021.

Tip: An easy way to accomplish this step is to use the report found at **Team > Benefits > Dependents** and add the Dependent Birthday and Dependent SS# columns.

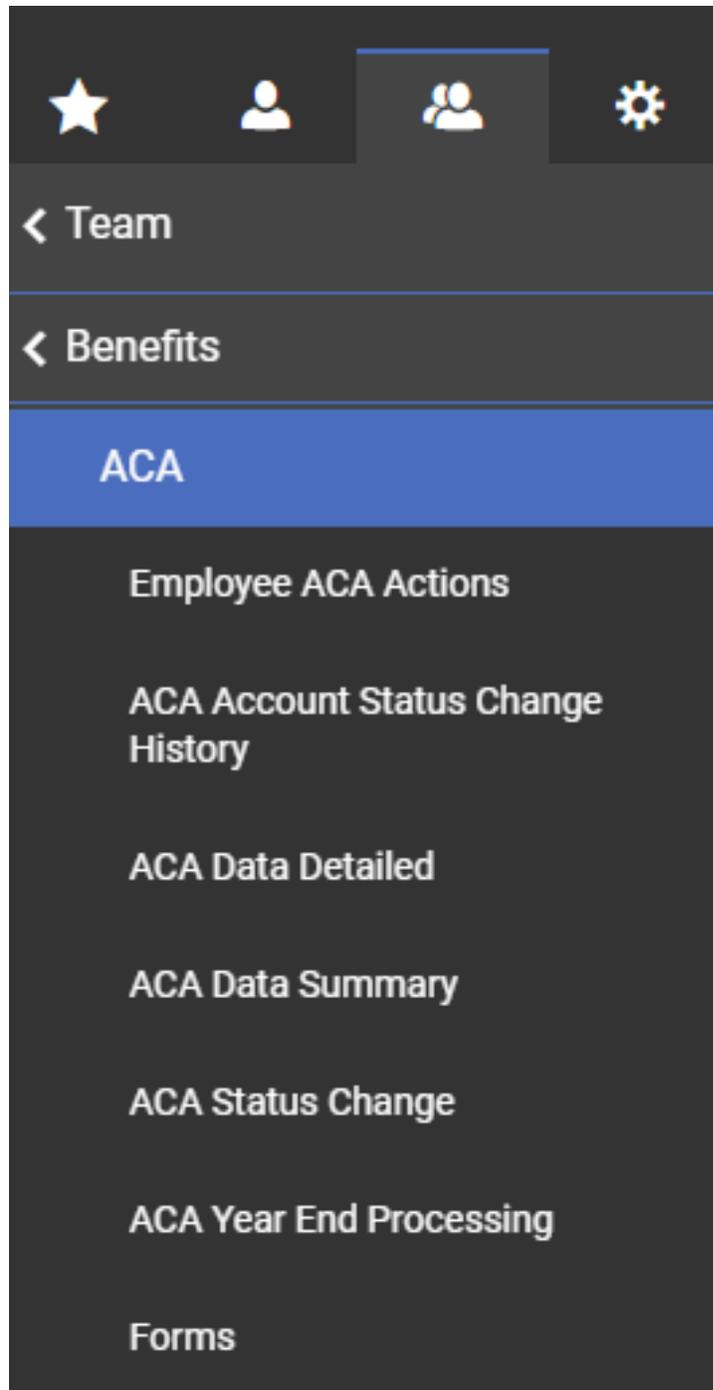


UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 5: Reporting That Can Assist in the Audit Process

Team > Benefits > ACA

Each of these system reports can be accessed depending on the security profile assigned to the user. If you cannot see one of these reports, please contact your system administrator to verify your access.





UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 5: Reporting That Can Assist in the Audit Process

Employee ACA Actions

Completed?

This report also gives you the opportunity to mass recalculate, clear an ACA Timeline if needed, and import historic data. The W-2 Safe Harbor process can be run from this location as well.

Employee ACA Actions

Page 1 of 20 | 1 - 20 of 383 Rows | Saved: [System]

Employee Id	Badge	Username	First Name	Last Name	In Payroll	Locked	Account Field 1	Employee Status	Current ACA Profile (Effective)	Average Hours in Current Measurement Period
starts with	*	*	starts with	starts with	All	All	*	*	starts with	*
247		Term	TermedFF	2015	No	Yes		Terminated	FT	

ACA Data Detailed

This report will give you a month-by-month report of data from the ACA Timeline.

ACA Data Detailed

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Employee Id	Username	First Name	Last Name	Employee Status	* Month	* Year	Hours	Month Status	ACA Status	1095-C Line 14 Codes (Series 1)	1095-C Line 15 Amount	1095-C Line 16 Codes
starts with	*	starts with	starts with	*	*	*	*	*	*	*	*	*

ACA Data Summary

This report will give you a month-by-month summary of employees and indicates any compliance alerts as well as the employees who will need to be tested in the following month to determine ACA status.

ACA Data Summary

Page 1 of 1 | 1 - 1 of 1 Rows | Saved: [System] | Dates: Last Month

Month	Year	Hours	ACA Status FT	ACA Status PT	Affordable Plan Offered	Minimum Value Plan Offered	Compliance Alert	Approaching ACA FT	Possible Downgrade	Employees Tested Next Month
*	*	*	*	*	*	*	*	*	*	*



UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 5: Reporting That Can Assist in the Audit Process

Form 1094-C Employee Count

Completed?

This report will give you a month-by-month count that will appear in Part III of Form 1094-C.



ACA Account Status Change History

This report will automatically group by employee and will show you the dates as they appear in each employee's ACA Employees Status History widget.





UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 6: ACA Settings Widget

Admin > Global Setup > Company Setup

Completed?

This widget will allow you to set a default ACA Profile (if desired), set the contact information to be used on both Forms 1094-C and 1095-C, enable your employees to consent to receiving an electronic copy of their Forms 1095-C (rather than a printed copy), and give you the ability to mask individuals' Social Security Numbers on the Form 1095-C.

Missing the ACA Settings widget from your tabs? This can be added to the tab of your choice (including a new one) via Edit Tabs.

Default ACA Profile

Optional

The Default ACA Profile will be set for any new hires but can be manually overridden if needed. If a default profile has been assigned, ensure that the selected profile and effective date of your default are both correct

ACA Form Contact Name

The name entered here will be used on Form 1094-C for the selected Employee Identification Number (EIN).



UKG Ready: ACA Manager 2021 Reporting Checklist

Checklist 6: ACA Settings Widget

ACA Form Contact Phone

Completed?

The phone number entered here will be used on Form 1094-C for the selected EIN and will appear on all Forms 1095-C for the selected EIN as well.

Enable COBRA reporting for self-insured health plan

Optional

If you have a self-insured healthcare plan and have employees or former dependents enrolled in their own COBRA policy, check this box to enable the Form 1095-C Dependent functionality.

Electronic Consent

Optional

The IRS has stated that — similar to Form W-2 — employees can give permission to their employer to provide Form 1095-C electronically only. Please note that this must be a separate consent from that for Form W-2.

In order for your employees to give their consent to receive Form 1095-C electronically, this box will need to be checked.

Tip: Make sure that the My 1095-Cs option in the ESS Security Profile is set to View.

Mask SSN

Optional

If you will be providing paper copies of Forms 1095-C to your employees, check the Enable box to mask the Social Security number (SSN) on the Form 1095-C. Once this box is checked, when the employee accesses their form via ESS or receives the printed copy, the first five digits of their SSN will be replaced with X's. (SSN 123-45-6789 will display as XXX-XX-6789) This will occur in both Part I (Employee Information) and Part III (Covered Individuals) of the Form 1095-C.

Any message entered in the Box Text field will display on the top of the form when accessed via ESS. The default message is "Please note that Social Security numbers have been masked on this form for increased security."