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Dynamics Payroll Inspector

ACA User Guide

Updated 12/30/16

1.	Introduction.....	4
2.	Dynamics Payroll Inspector for ACA Overview	5
3.	Employee Full-Time Status Verification Widget	6
3.1.	Introduction to the Full-Time Status Widget.....	6
3.2.	Initial Widget Setup	6
	Full-Time Status Settings.....	7
3.2.1.	Aggregated ALE Group Setup	7
3.2.2.	Company Settings wizard	9
3.2.3.	Measurement Groups	11
3.3.	Resolution Wizard	15
3.3.1.	Understanding the Results.....	17
3.3.2.	Hours Worked per Week Breakdown.....	17
3.3.3.	Status Explanation and Altering Results	18
4.	ACA Employee Coverage Widget.....	20
4.1.	Introduction to the Employee Coverage Widget	20
4.2.	Initial Widget Setup	20
4.2.1.	Company Settings.....	22
4.2.2.	Deductions.....	22
4.2.3.	GP Human Resources Usage.....	22
4.2.4.	Plan Groups.....	23
4.2.5.	Affordability Groups	28
4.3.	Using the ACA Employee Coverage Widget	30
4.3.1.	Understanding Results.....	32
4.3.2.	Employee Coverage Details	34
5.	Data Considerations	39
5.1.	Payroll History Requirements	39
5.2.	Payroll History Hours.....	39
5.3.	Insurance Election Information	39
5.4.	Historical Election Information	40
5.4.1.	Reading from HR Benefit History	40
5.4.2.	Reading from Dynamics Payroll Inspector's Payroll Deduction History	40
5.5.	Dependent Elections	41
5.6.	FMLA / Jury Duty / Military / Summer Break Leave	41
6.	Payroll Only Considerations	42
6.1.	Interpretations	42
6.2.	Common Scenarios	42
7.	Creating 1095-Cs	44
7.1.	GreenshadesOnline Paystubs Client.....	44
7.2.	Greenshades Tax Filing Center Client.....	45
8.	Definitions	47

8.1.	Hour of Service.....	47
8.2.	Minimum Value.....	47
8.3.	Affordability.....	48
8.4.	Look-Back Measurement Method.....	48

1. Introduction

Dynamics Payroll Inspector (DPI) is designed to scan your payroll and human resources data and alert you to any potential issues within minutes of a change. It can be used to ensure that your employees have a valid mailing address, have an accurate Social Security Number, are being offered health insurance according to the Affordable Care Act, and that they have the correct withholding taxes mapped to them at the correct rates.

Because Dynamics Payroll Inspector is modular, new modules can be added or enabled to scan only what matters to your company. In addition to this, each module can be configured with settings to match your needs.

When you purchase Dynamics Payroll Inspector, the standard modules are included. These are Employee Address Verification and Employee Identity (SSN) Verification.

Additional modules are purchased separately and include:

- Affordable Care Act Employee Full-time Status and Coverage Verification
- Employee Tax Code Verification and Local Tax Rate Verification
- Employee Sick Leave Amount Verification

This guide covers the Affordable Care Act Full-time Status and Coverage Verification modules. This guide is a companion to the Basic User Guide, which should be read first. Find the Basic User Guide and other guides at <http://www.greenshades.com/download-dynamics-payroll-inspector.php>.

2. Dynamics Payroll Inspector for ACA Overview

The Affordable Care Act (ACA) has a number of complex rules, which can be difficult to maintain without assistance. They are difficult to manage manually and difficult to manage with the tools Dynamics GP, alone, has to offer. That is why Dynamics Payroll Inspector's ACA modules are designed to plug into and enhance your Dynamics GP Payroll and/or Human Resources system to a point that you are able to seamlessly and accurately handle the Affordable Care Act coverage and reporting requirements.

Dynamics Payroll Inspector is built with two widgets to assist with ACA:
Employee Full-Time Status Verification and Employee Coverage Verification

The Employee Full-Time Status Verification widget inspects employees pay records, using the ACA Lookback Period approach, to determine if the employee has worked over 30 hours per week and thus should be considered full-time. If the widget finds that the employee should be considered full-time, but was not marked as such, the widget will alert you to update the employee. This alert will update the employee's status and, more importantly, alert you to the fact that you need to offer him or her health insurance coverage. All of the relevant dates, such as when you must offer coverage by, are provided along with the notification.

The Employee Coverage Verification widget inspects full-time employees to ensure you have offered them coverage according to the Affordable Care Act requirements. This inspection reviews your payroll or your human resources data to determine this and will allow you to update this information directly within Dynamics Payroll Inspector. If you only have payroll, this inspection reviews your deduction codes to determine what the employee was enrolled in. If you have human resources, this inspection will look at the benefit history to determine which codes were offered to employees. (Details on what Dynamics Payroll Inspector looks for in both payroll and human resources are described later in the document.) When Dynamics Payroll Inspector finds that an employee is full-time, but has not been offered the required health insurance coverage, the widget will alert you and explain what it found. This alert will describe each month's coverage. If it is a bookkeeping problem, you can update the information directly in Dynamics Payroll Inspector and it will update Dynamics GP. If the coverage was truly not provided, it will alert you to the fact that you need to offer coverage to the employee or potentially face a penalty.

Throughout the year, or at the end of the year, when these widgets inspect your data they are collecting the required information for your annual 1095-C reporting. When the year is complete, Dynamics Payroll Inspector will have a full record of everything necessary for creating your 1095-Cs on the GreenshadesOnline Year-End Forms portal.

3. Employee Full-Time Status Verification Widget

3.1. Introduction to the Full-Time Status Widget

The Dynamics Payroll Inspector Employee ACA Full-Time Status widget is designed to assist you with keeping track of which employees are considered full-time or non-full-time based on Affordable Care Act rules.

After setup, it will scan your payroll data to see how many hours have been worked by each employee and calculate their average hours per week over your selected measurement period.

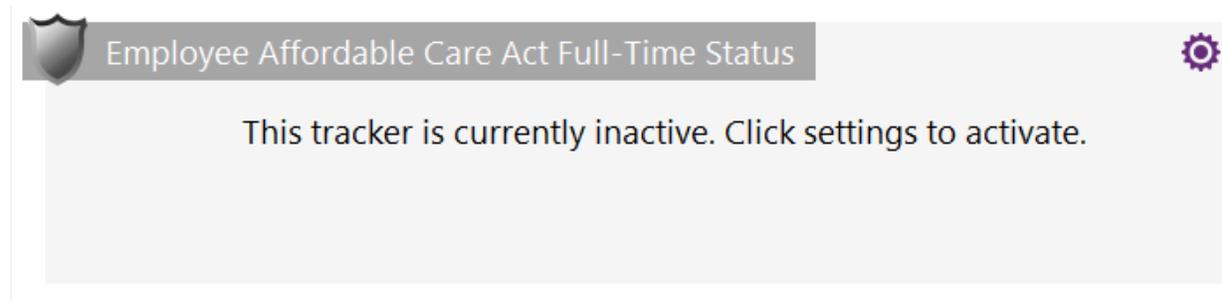
This widget uses the [ACA Lookback Measurement Method](#). Under the look-back measurement method, an employer may determine the status of an employee as a full-time employee during what is referred to as the stability period, based upon the hours of service of the employee in the preceding period, which is referred to as the measurement period.

! It is important to note that the widget is specifically looking at transaction dates on checks, and does not look at the check date itself.

3.2. Initial Widget Setup

! If your widget has already been set up, you will want to proceed to the section on the [Resolution Wizard](#). Modifying your widget settings may change which employees are considered full-time and could impact which employees are offered health insurance.

Before you are able to begin scanning your payroll, you will need to do some basic set up. Upon first launch, your widget will be disabled. Click on the gear icon in the top right corner of the widget to enter the setup screen.



Once you're within the setup screen, you'll need to activate the widget by clicking the checkbox next to "Tracker is Active?"

Affordable Care Act Full Time Status Settings Close

This tracker will determine the full-time status of active employees according to ACA look-back period requirements. This tracker is set to inspect your payroll data every hour.

0 Employee Full-Time Statuses have been verified and 0 have been ignored

Tracker is Active? [Advanced Settings](#)

Aggregated Group ?

This company is not currently setup as a member of an Aggregated ALE Group.

[Create Aggregated ALE Group](#)

Company Settings

Click the Edit Company Settings button below to modify company-level settings.

Current Settings:

Observe break-in-service rules?	13 Weeks
Store full-time determination in GP?	Do not store
Employees that are automatically full-time:	Employee Class: FULLTIME, MONTHLY, OFF-MONTH
New hire initial measurement start:	Date of Hire
Mileage- or Piecework-based employees?	Yes
Paycodes to include toward Hours Worked?	HOUR, MILES, SALTEST, SALY, SICK, VAC. ... View All Paycodes

[Edit Company Settings](#)

Measurement Groups

Define measurement groups for different groups of employees. These measurement periods are the basis for determining the employee's full-time status and other important dates for health insurance coverage.

[Create Measurement Group](#) 3 employees of 95 are currently covered by a measurement group

	Name	Measurement Period Length	Stability Period Start Rule	Full Time Stability Period Length	Non Full Time Stability Period Length	
Edit	GRU	12 months	First of the mon...	12 months	12 months	Remove

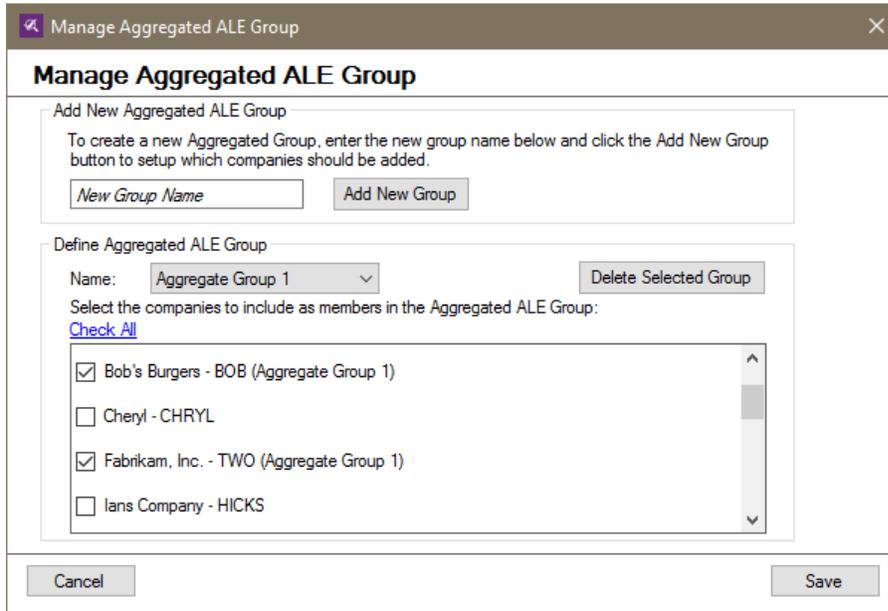

Authorized User

Full-Time Status Settings

3.2.1. Aggregated ALE Group Setup

To set up an Aggregated ALE Group, click on "Create Aggregated ALE Group" if there are currently no groups set up or "Manage Aggregated ALE Groups" if there

are one or more groups already set up. The Manage Aggregated ALE Group window will display (see image below).



You will need to assign your Aggregated ALE Group a name in the text-field titled “New Group Name”, and then click “Add New Group”.

After doing so, you will then be able to select which companies will be included in this Aggregated ALE Group. You must select at least two companies to save.

If you require more than one Aggregated ALE Group, you may create multiple groups and select them from the drop-down list in the “Define Aggregated ALE Group” section. You will not be able to select any companies that have already been included in another Aggregated ALE Group.

Once you are satisfied with your selections and/or changes, click “Save”.

! Dynamics Payroll Inspector needs to ensure that its tables are installed on each company database you have included as a member of an Aggregated ALE Group. Because of this, it may take some time for the process to complete after clicking Save. Please be patient and allow it finish to ensure no tables are corrupted in the process.

3.2.1.1. Aggregated ALE Group Impact

Once you create an Aggregated ALE group, both the Employee Full-Time Status widget and the Employee Health Insurance Coverage widget will use aggregated data instead of individual company data. This has the largest impact on employees who worked in multiple companies. Dynamics Payroll

Inspector identifies these employees using Social Security Number. For these employees, the hours worked in either company are combined into their full-time determination and the health insurance coverage offered in either company is aggregated into their coverage determination. For reporting, Dynamics Payroll Inspector will consider the employee to be full-time in only one company per month, using the company where the employee worked the most hours.

3.2.2. Company Settings wizard

The Company Settings section displays the company-level settings set up within the wizard. Click to “Edit Company Settings’ to work through the Company Settings wizard for the following settings. All settings chosen will be displayed in the section within the main settings page for reference.

3.2.2.1. Would you like to observe break-in-service rehire rules? 13-week or 26-week break-in-service rules

By default, the Dynamics Payroll Inspector observes the 13-week break-in-service rule. You may choose to classify your company as an Educational Institution and follow the 26-week break-in-service rule instead, which will recognize the longer break-in-service for those employees and not classify them as a new hire following summer breaks.

If you rather have rehires always considered as ongoing employees upon return rather than a new hire, you may uncheck this setting to disable the 13- or 26-week break-in-service rules.

3.2.2.2. Would you like to store each employee’s ACA Full-Time Determination in GP?

This dropdown list will allow you to select where, within your GP system, you would like Dynamics Payroll Inspector to store an employee’s status. You have a range of choices from Payroll User Defined 1 and 2, HR Custom Fields, or you can also choose not to store the determination at all by unchecking the setting. Dynamics Payroll Inspector will still store the determination internally, regardless of whether or not you store it within GP.

3.2.2.3. Would you like certain New and Ongoing employees to always be considered Full-Time?

The Affordable Care Act has special rules for employees who you consider to be full-time on hire and ongoing. To designate to the Dynamics Payroll Inspector which employees are to be considered automatically full-time, regardless of hours worked within a measurement period, select the employee class(es), employment type(s), department(s), or position(s) for your full-time employees. This will ensure that the employees are automatically considered full-time if they fall within the selected field.

3.2.2.4. For variable-hour new hires, when would you like their initial measurement period to start?

You can choose to start an employee's initial measurement period either on the date of hire, adjusted date of hire, or on the first of the following month following either of those.

3.2.2.5. Do you have any mileage- or piecework-based employees that you would like to set up rates per hour for?

You can specify if your company supports mileage- or piecework-based employees through pay codes in GP. Checking/Enabling this setting will display two additional columns in the pay codes selection grid. The admin will then be able to select which pay codes in GP are piecework and enter the pieces per hour conversion to be used in calculating hours for an employee with this pay code.

3.2.2.6. Please select which paycodes represent hours of service for your employees:

Employee full-time status is determined by using their [hours of service](#). This setting allows you to tell us which of your pay codes should be considered as hours of service. Dynamics Payroll Inspector will automatically attempt to determine the relevant pay codes in your system. It will automatically check the boxes it thinks are correct, but you may wish to review these and select or unselect any pay codes you feel are correct or incorrect. Each pay code has a description and pay type associated with it. You also have the option to filter

pay codes by each of these fields. Along with the ability to check/uncheck all pay codes.

! The UnitsToPay in Dynamics GP payroll history for each of these pay codes will be considered hours worked and calculated into the employee's average hours.

! If you have employees or scenarios where hours are not present in Dynamics GP, please see the [Payroll History Hours](#) section for more information.

3.2.2.7. Aggregated ALE Group Member Consideration

Companies that are included in an [Aggregated ALE Group](#) will need to set up these company-level settings contained in the Company Settings wizard for each company included in the Aggregated ALE Group.

To assist in this process, you can toggle between Aggregated ALE Group members/companies from one company's setting page to set these company-level setting for each company, rather than having to fully switch into the company within the Dynamics Payroll Inspector.

All companies included in the Aggregated ALE Group will appear in the drop-down list within the Company Settings section. The company settings for the selected company will appear within the section. If Dynamics Payroll Inspector detects that a company has not set up their company settings, it will alert you within this section and the company will display as purple within the drop-down list.

3.2.3. Measurement Groups

Measurement groups are the main configuration of the Look-back Measurement Method. You may have more than one group under ACA, but most companies only have one.

Measurement Groups
Define measurement groups for different groups of employees. These measurement periods are the basis for determining the employee's full-time status and other important dates for health insurance coverage.

Create Measurement Group 16 employees of 16 are currently covered by a measurement group

	Name	Measurement Period Length	Stability Period Start Rule	Full Time Stability Period Length	Non Full Time Stability Period Length
Edit	ARCHR MG	12 months	First of the month...	12 months	12 months

To create a new measurement group, click on the “Create Measurement Group” button. Otherwise, you can edit an existing one by clicking “Edit”.

3.2.3.1. Define Group

- **Measurement Group Name**
Give the group an appropriate, unique name.
- **Select Employees for Measurement**
You can select groups of employees by checking one or more boxes in each of the subsections here: Salaried Status, Union Codes, Work Location State.

This can help you narrow down your measurement group if it varies based on any of these factors (these are the only factors allowed by ACA).

Measurement Group Settings

Create Measurement Group

Measurement Group Name

Please give this measurement group a unique name:

Select Employees for Measurement

According to the Affordable Care Act, you may group employees into Measurement Groups based on the categories below to determine an employee's full-time status based on their hours worked.

Please select the categories of employees that apply to this Measurement Group

<p>Salaried Status</p> <p><input type="checkbox"/> Check All</p> <ul style="list-style-type: none"> <input type="checkbox"/> Blank (ARCHR) <input checked="" type="checkbox"/> VARIABLE (ARCHR) <input type="checkbox"/> FULLTIME (ARCHR) <input type="checkbox"/> MONTHLY (ARCHR) <input type="checkbox"/> OFF-MONTH (ARCHR) <input type="checkbox"/> FULLTIME (LANA) <input type="checkbox"/> VARIABLE (LANA) 	<p>Union Codes</p> <p><input type="checkbox"/> Check All</p> <ul style="list-style-type: none"> <input type="checkbox"/> Blank (ARCHR) <input type="checkbox"/> Blank (LANA) 	<p>Work Location State</p> <p><input type="checkbox"/> Check All</p> <ul style="list-style-type: none"> <input type="checkbox"/> PA (ARCHR) <input type="checkbox"/> CA (ARCHR) <input type="checkbox"/> KY (ARCHR) <input type="checkbox"/> NY (ARCHR) <input type="checkbox"/> OH (ARCHR) <input type="checkbox"/> OR (ARCHR) <input type="checkbox"/> CA (LANA) <input type="checkbox"/> NY (LANA) <input type="checkbox"/> OR (LANA)
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

3.2.3.2. Stability Period

You will determine how long your Full-Time and Non-Full-Time stability periods last. Under the Affordable Care Act, the Full-Time stability period cannot be shorter than the measurement period and must be at least 6 months in length. Most people set the Full and the Non-Full- Time stability periods to be the same length.

Measurement Group Settings

Create New Measurement Group

Stability Period

How long is your company's full-time stability period? 12 Months ▾

How long is your company's non-full-time stability period? 12 Months ▾

Administration Period

My Administrative Period lasts exactly 61 days. My Stability Period begins immediately afterwards.

My Administrative Period lasts until the end of the month following 61 days. My Stability Period begins on the first day of the following month.

Measurement Period

How long would you like your measurement (lookback) period to be? 12 Months ▾

What is the first day of your company's work week? Sunday ▾

When did your company's [current measurement period start](#)? 11/ 1/2015 📅 ▾

Measurement Period	Administrative Period	Full Time Stability Period	Non-Full Time Stability Period
11/1/2014-10/31/2015	11/1/2015-12/31/2015	1/1/2016-12/31/2016	1/1/2016-12/31/2016
11/1/2015-10/31/2016	11/1/2016-12/31/2016	1/1/2017-12/31/2017	1/1/2017-12/31/2017
11/1/2016-10/31/2017	11/1/2017-12/31/2017	1/1/2018-12/31/2018	1/1/2018-12/31/2018

The diagram illustrates the sequence of periods over time. A horizontal timeline shows three main segments: a blue 'Measurement Period' from 11/01/2015 to 10/31/2016, a red 'Admin' period from 11/01/2016 to 12/31/2016, and a green 'Stability Period' from 01/01/2017 to 12/31/2017. Above the timeline, a dashed line labeled 'Current Stability Period' spans from the start of the measurement period to the end of the stability period. Below the timeline, another dashed line labeled 'Next Measurement Period' spans from the end of the current measurement period to the end of the next measurement period.

Cancel Back Save

3.2.3.3. Administrative Period

Your Administrative Period comes after the Measurement Period (set up below) and usually includes your open enrollment.

Select the method by which you'd like to calculate your Administrative Period. You can choose to specify exactly how many days it will last, or you can choose to state that it lasts until the end of the month following X amount of days.

! Your Administrative Period cannot be longer than 90 days, and choosing the second option will likely require you to input less than 90 days as your option.

3.2.3.4. *ACA Measurement Period (look-back period)*

Measurement periods are the basis by which Dynamics Payroll Inspector calculates an employee's average hours over a certain timespan. According to the Affordable Care Act, a measurement period can be as short as 3 months or as long as 12 months. This is commonly called the "look-back period" and will typically be 12 months.

- ***Length of your measurement period (typically 12 months)***
First, you'll need to pick the length of your measurement period. This can be as few as 3 months and as many as 12 months.
- ***The first day of your company work week***
Next, select the first day of your company's work week. This will help the Dynamics Payroll Inspector determine how to handle fractions of weeks that occur due to months not evenly dividing by 7 days.
- ***Start Date of your most recent measurement period***
Lastly, you'll want to select the date on which your current measurement period started. Dynamics Payroll Inspector will automatically go back about 2 measurement periods prior to this date to establish a history, and will continue using this date as a basis into the future. You will not need to create a new measurement group each year, as the one you've created will continue on in perpetuity.

! If you do not have 2 measurement periods worth of payroll data, Dynamics Payroll Inspector may not be able to determine your employees' full-time status for the current year. This may impact its ability to create 1095-Cs. See the [Payroll History Requirements](#) section for more information.

3.2.3.5. Affordable Care Act Periods

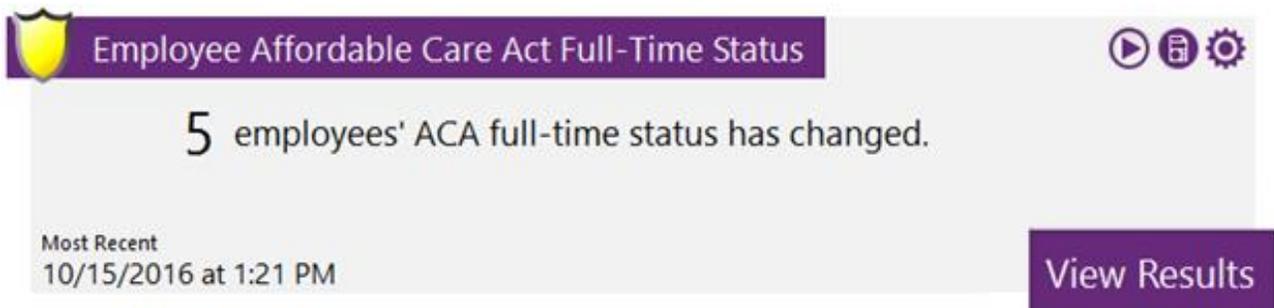
- **Based on the options you have specified:**

This grid will show you how the dates you've selected above will play out over time. It adjusts in real-time, so you can make adjustments above and see the results down here.

! If your widget has already been setup, modifying your widget settings may change which employees are considered full-time and could impact which employees are offered health insurance.

3.3. Resolution Wizard

The first time you run the widget, you should get results for each employee that falls into a measurement group. On subsequent runs, you'll be alerted to employees whose statuses are changing.



The screenshot shows a widget titled "Employee Affordable Care Act Full-Time Status". The main notification reads "5 employees' ACA full-time status has changed." Below this, it says "Most Recent 10/15/2016 at 1:21 PM". In the bottom right corner, there is a purple button labeled "View Results". The widget also features a yellow shield icon on the left and play, refresh, and settings icons on the right.

Once the widget has completed inspecting, you can click "View Results". You will then be taken to a dashboard screen that gives an overview of the results and a percentage of how many employees within your company are full-time based on ACA rules.

Affordable Care Act Full-Time Status Results Close

Click any of the links below to view pre-filtered Full-Time Status results. If you wish to view results for all employees, click the "View All Results" link

3 Employees' full-time status were inspected

0 Employees' full-time status do not need to change

0 Employees became full-time and should be offered health insurance

0 Employees need an offer of coverage in the next stability period

2 Employees are no longer full-time at the end of their current stability period

[View All Results](#)

Upcoming Action Items

- 0** Employees have a measurement period ending within the next month
- 0** Employees have a stability period starting in the next month
- 0** Employees have a stability period ending in the next month
- 0** Employees' status could not be determined

New Employees

- 0** New employees this month
- 0** Full-time new hires this month
- 0** Variable-hour new hires this month

After clicking View All Results or a pre-filtered link, you'll be taken to the results grid.

Affordable Care Act Full-Time Status Results Close

44 Aggregated Employees' full-time statuses were inspected

5 Aggregated Employees need an offer of coverage in the next

5 Aggregated Employees became full-time and should be offered health insurance

2 Aggregated Employees are no longer full-time at the end of their current stability period

Show: All Employees in Aggregated Group

Employee ID	First Name	Last Name	Change in status	Avg. Hours	Measurement Period	Status	Stability Period
Employee		Change In Status	Measurement Period		Stability Period		
<input checked="" type="checkbox"/>	Elston	Guillory	Yes		11/01/2014-10/31/2015 39.89 hours/week	Full-Time	01/01/2016-12/31/2016
	Carl	Hall	No		11/01/2015-10/31/2016 Initial Measurement Period	N/A	Undetermined
<input checked="" type="checkbox"/>	Yoel	Harper	Yes		11/01/2014-10/31/2015 39.86 hours/week	Full-Time	01/01/2016-12/31/2016
	Gawain	Heaps	No		04/01/2016-03/31/2017 Initial Measurement Period	N/A	Undetermined
	Denise	Hilty	No		04/15/2016-04/14/2017 Initial Measurement Period	N/A	Undetermined

[Export to Excel](#) [Reset Filters](#)
Results 1 - 20 [Next \(21-40\)](#) >>
[Back](#) [Close](#)

This view will allow you to filter for certain types of employees to create customized reporting. You can export the results displayed in the grid (either all results or a filtered set) to an excel report to review the results data further.

3.3.1. Understanding the Results

The results are broken down into 4 columns of filterable data:

- Employee Information (Employee ID, First Name, Last Name)
- Change in Status (Yes or No)
- Measurement Period dates with Hours Worked per Week
- Stability Period dates with Full-Time determination for the given stability period

You may also review an expanded view for an employee if Dynamics Payroll Inspector detects more than one measurement period worth of data for the employee.

! If you're not seeing an employee or group of employees, it may be because your measurement period has just ended, but you haven't run a pay run yet. Dynamics Payroll Inspector needs transactions that go beyond the end of the measurement period so that it has a complete set of data with which to do its calculations. Until a pay run is run that is after the measurement period, it will not be able to accurately calculate average hours and will not show a result.

3.3.2. Hours Worked per Week Breakdown

For each measurement period found for each employee, the user can click on the hours/week displayed within the grid and view a detailed breakdown of the hours worked per week during the given the measurement period with additional details, some based on set up including pay codes for calculation, for why an employee is determined a certain way.

This report may also be exported to an excel download.

! If an employee is in their initial measurement period, they will be indicated as such on the grid and will not have hours/week yet.

Affordable Care Act Full-Time Status Weekly Breakdown

Elston Guillory	GUIL0001	Measurement Period:	11/01/2014-10/31/2015
Hire Date:	10/01/2014	Administrative Period:	11/01/2015-12/31/2015
Employee Type:	OngoingEmployee	Stability Period:	01/01/2016-12/31/2016

This is an ongoing employee who has worked more than 30 hours per week on average and therefore is a **Full-Time** employee.

The employee worked a total of **2113.98 hours** over a period of 53 weeks for an average of **39.89 hours**. Hours start calculating on the first day of the measurement period, which was 11/1/2014.

Week beginning:	Hours:	Week beginning:	Hours:
10/26/2014	39.57	05/03/2015	40.00
11/02/2014	39.57	05/10/2015	40.00
11/09/2014	39.57	05/17/2015	40.00
11/16/2014	39.57	05/24/2015	40.00
11/23/2014	39.57	05/31/2015	40.00
11/30/2014	39.57	06/07/2015	40.00
12/07/2014	39.57	06/14/2015	40.00
12/14/2014	39.57	06/21/2015	40.00
12/21/2014	39.57	06/28/2015	39.75
12/28/2014	39.94	07/05/2015	39.57
01/04/2015	40.44	07/12/2015	39.57
01/11/2015	40.44	07/19/2015	39.57
01/18/2015	40.44	07/26/2015	39.57
01/25/2015	40.44	08/02/2015	39.57
02/01/2015	40.44	08/09/2015	39.57
02/08/2015	40.44	08/16/2015	39.57
02/15/2015	40.44	08/23/2015	39.57
02/22/2015	40.44	08/30/2015	39.57
03/01/2015	40.44	09/06/2015	39.57
03/08/2015	40.44	09/13/2015	39.57
03/15/2015	40.44	09/20/2015	39.57
03/22/2015	40.44	09/27/2015	39.57
03/29/2015	40.19	10/04/2015	39.57
04/05/2015	40.00	10/11/2015	39.57
04/12/2015	40.00	10/18/2015	39.57
04/19/2015	40.00	10/25/2015	39.57
04/26/2015	40.00	N/A	N/A

[Export to Excel](#) Finish

3.3.3. Status Explanation and Altering Results

Clicking into an employee’s status determination from the result’s grid provides a statement explaining the overall results of the employee’s full-time status check, including the whether the employee was determined to be Full-time, Non-Full-Time, or Undetermined. Additionally, important details are provided below this explanation to further clarify the results. The information provided depends on the results of the employee. Here are the possible fields provided:

Calculated Hire Date: When the employee is considered a new hire, the calculated hire date is provided. Sometimes the calculated hire date is not the same as the hire date in

GP. The calculated hire date will be different if Dynamics Payroll Inspector detects a break in service long enough that the employee should be treated as a new hire according to ACA. In this case, the calculated hire date would be the date of return from the break in service.

Measurement Period: This is the date range used for determining the employee's average hours. This is typically the company measurement period, but may be the employee's initial measurement period if the employee is considered a new hire.

Average Hours: The average hours calculated for the above measurement period are displayed and the break accessible by clicking the link.

Coverage Must Be Offered By: If the employee is determined to be full-time, the date when the administrative period ends and the employee must be offered health insurance is provided. This is to assist you in making sure you offer the employee health insurance by this date, which is the start of the next stability period.



If you do not agree with the calculated status determination for the employee, you may choose to "ignore" this suggestion and change the status by clicking the link within this window. The employee will then be set to the opposite status and their requirements for offer of coverage will be based on that status.

If there was a change in status, on closing the results grid, the status will save and sync to GP a user defined field, if chosen on set up.

When you are done reviewing results, click "Close", and the widget will update any changes and scan once more.

4. ACA Employee Coverage Widget

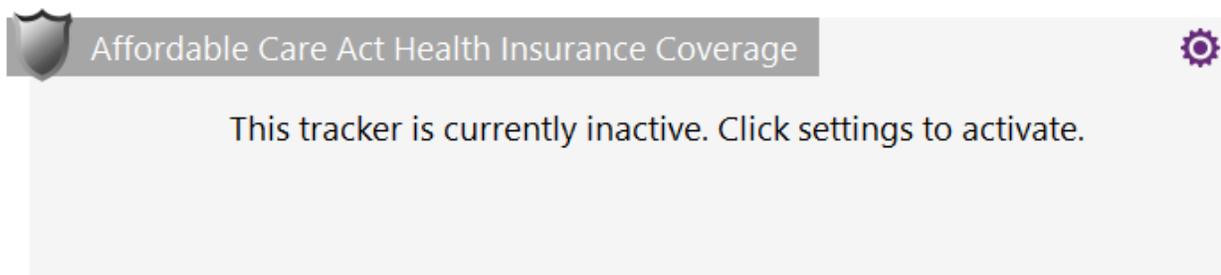
4.1. Introduction to the Employee Coverage Widget

After completing the Full-Time Status determination process, you are now ready to run the ACA Employee Health Insurance Coverage Widget. It is essential that you've run the Full-Time Status widget first, so that the Coverage Widget will know which employees are Full-Time and require coverage.

This widget looks to confirm that all employees with a Full-Time status determination are offered the correct level of coverage and affordable cost as required by the ACA.

4.2. Initial Widget Setup

Before you are able to begin scanning your employees for coverage, you will need to do some basic set up. Upon first launch, your widget will be disabled. Click on the gear icon in the top right corner of the widget to enter the setup screen.



Once you're within the setup screen, you'll need to activate the widget by clicking the checkbox next to "Widget is Active?"

Affordable Care Act Health Insurance Coverage Settings

Close

This tracker will review the health insurance coverage provided to full-time employees under ACA requirements. This tracker is set to inspect your payroll data every hour.

Tracker is Active?

[Advanced Settings](#)

Company Settings

Does your company offer coverage before it is required at the end of an employee's [Limited Non-Assessment Period](#)?

My company offers coverage days following hire.

Which date should be used to determine your employees' Coverage End Date?

Deductions

If you have weekly or bi-weekly deductions, please select how many deductions your plan has per year:

GP Human Resources Usage

Benefits' Setup

- I have my benefits set up in Human Resources
- I do not have my benefits set up in Human Resources (use payroll instead)

[Dependents/Covered Individuals:](#)

- I have dependents' coverage set up in the Advanced HR module
- I have dependents' coverage set up through the Health Ins. Coverage Indicator on the Dependents Card

Plan Groups (Previously Code Mapping)

- [Edit](#) EE + Spouse [Remove](#)
- [Edit](#) EE + Family [Remove](#)

Aggregated Affordability Safe Harbor Groups

All members of this aggregated group must have the same affordability groups, however you may define affordability safe harbor groups for different groups of employees. These groupings will be used when determining affordability for your employees.

Note: If an employee is not assigned to an Affordability Group, the Federal Poverty Line will be used to determine affordability.

	Aggregated Affordability Group Name	Safe Harbor Type	Aggregated Employees Included in Group
Edit	All: Federal W-2	Rate of Pay	93 of 93 employees

Once you've enabled the widget, you can access the rest of the settings for the widget.

4.2.1. Company Settings

4.2.1.1. Does your company offer coverage before it is required at the end of an employee's Limited Non-Assessment Period

You can set a number of days that your company offers coverage after hire before it is required by ACA at the end of an employee's Limited Non-Assessment period. By default, Payroll Inspector considers a new employee's first full 3 months of employment as their Limited Non-Assessment period, which indicates as a 2D on Line 16 of their 1095-C; however, if you offer coverage before that 90-day requirement enter within this setting to override code 2D with the applicable coverage code for those months. Includes a link out explanation window for Limited Non-Assessment Period for further details.

4.2.1.2. Which date should be used to determine your employees' Coverage End Date

Ability to set the date that is used to determine when an employee's Coverage End Date should be. By default, Payroll Inspector uses the Last Day Worked field from GP; however, we have expanded the options to include Inactive/Terminated Date from GP or extend to the last day of the month following Inactive/Termination date. This will help to more accurately determine Line 16 codes for your employees' 1095-C forms.

4.2.2. Deductions

This setting allows you to set how many deductions your plans have per year for weekly or bi-weekly deductions. You can choose either 52/26 or 48/24.

4.2.3. GP Human Resources Usage

Next, you will need to select whether you track your benefits using the Human Resources module in GP, or if you use the Payroll module in GP. If you don't have the Human Resources module in GP, this option will automatically be greyed out and the Payroll option will be selected.

Use of Payroll Only comes with additional constraints and considerations because GP Payroll does not naturally collect all of the information required for ACA

reporting. To see more details about expectations when working with Payroll Only, see the section on [Payroll Only Considerations](#).

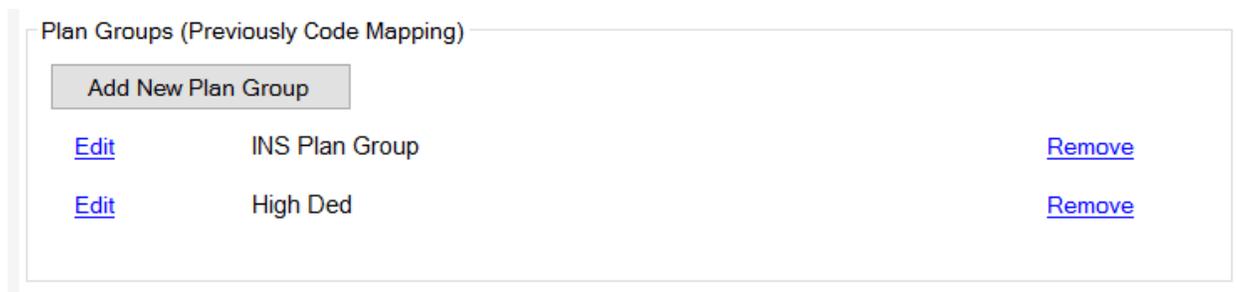
For those clients using Dynamics GP 2013 or higher, the Dependents/Covered Individuals setting allows you to choose to pull dependent ACA coverage information as set up through the Health Ins. Coverage indicator on the Dependents Card or the defaulted Advanced HR module.

4.2.4. Plan Groups

Dynamics Payroll Inspector requires that you set up at least one employee only HR Benefit or Payroll Deduction code for each plan group offered to employees. You may set up more codes to specify employee plus spouse, employee plus family, etc. but you must – at a minimum – have an employee only code for each plan group. This allows Dynamics Payroll Inspector to determine the employee only cost separately for affordability purposes from the cost of the spouse and dependent coverages.

The Plan Groups wizard is used to group up your codes. This will tell Dynamics Payroll Inspector which codes belong together and allow it to make certain assumptions that will reduce bookkeeping requirements in GP. For example, Dynamics Payroll Inspector will automatically assume that if the employee was enrolled in an Employee+Spouse code, he was offered the employee only code as well, even if there is no association in GP for the employee and that code. This also works conversely so that offering an employee only plan (that has any employee “plus” codes included in the plan group) will be deemed as also having offered the upgrade plans as well.

To begin, click to “Add New Plan Group”. This will open the Plan Group wizard and walk you through setting up a Plan Group.



4.2.4.1. Name and Plan Selections

Each Plan Group must be set up with a unique name to identify it and will be set within this first step of the wizard. This is the name that will be displayed within the main settings section for quick reference.

All Available Deduction or Benefit codes (depending on if the company uses GP Payroll or HR) will be displayed in the left grid. If a code has already been included in a different Plan Group, it will be greyed out and unavailable to select.

Choose the codes/plans to include in the Plan Group and, using the arrows in the center, move it into the right grid. For each selected plan, indicate a coverage level. Each Plan Group must have an Employee Only plan set up to continue.

Plan Group Setup
✕

Plan Group Setup
🔍

Plan Group Name:

Select the Deduction Code, representing each plan, to include in this group by selecting/highlighting them on the left and using the arrows in the middle to add it to the right grid. Once the plan is added to the plan group, indicate each plan's coverage level within the drop-down list.

To select multiple deduction codes, hold the CTRL key while selecting each field.

Available Deduction Codes		Selected Plans		
Deduction Code	Description	Deduction Code	Description	Coverage Level
Filter	Filter			
401K	401(k) Deduction	INS	Insurance Premium	Employee Only ▼
CHD	Child Care Deduction	INS1	Insurance (+1 depe...	Employee + Spouse ▼
EPU	Employee Purchases	INS2	Insurance (family co...	Employee + Family ▼
MED	Medical Flex			
ROTH	ROTH 401			
UW	United Way			
HDHPEE	High Deductible EE Only			

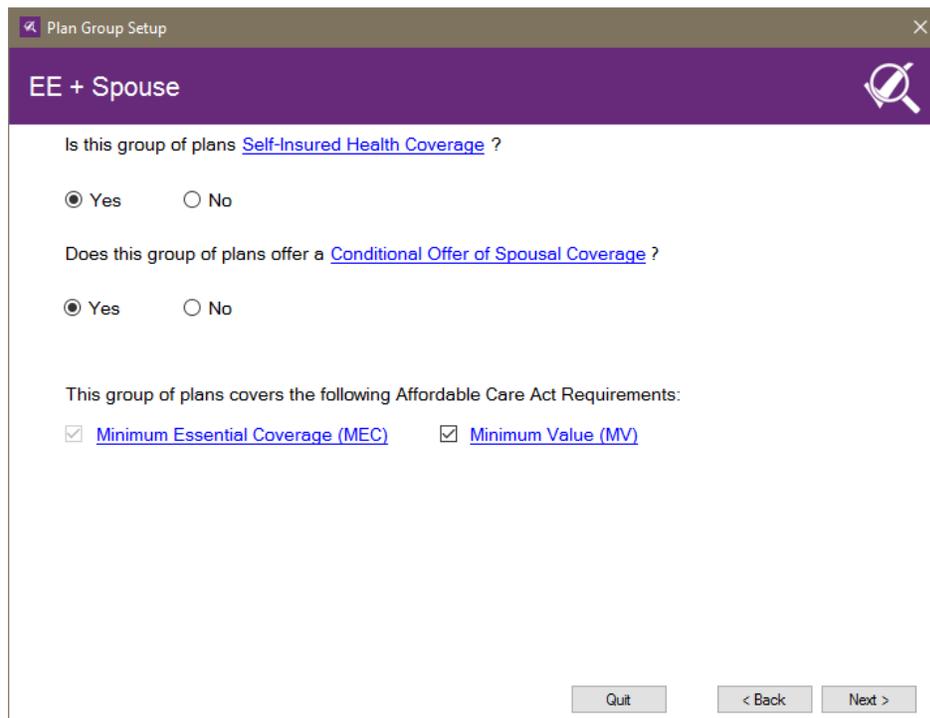
Note: If an employee is associated to a Benefit code only, rather than a deduction code from above, the benefit code's information will be used and the employee premium is assumed to be \$0.00. In this case, make sure that your Master Deduction Code is the same name as your Benefit Code.

4.2.4.2. Self-Insured and ACA Requirements

A radio button selector is available to indicate if the plan group contains self-insured health coverage codes. This indication will apply to all codes/coverage levels set up within this Plan Group. By indicating that a plan is self-insured, your non-full-time employees who have received an offer and enrolled in self-insured coverage will appear within your results and upload into Year-End Forms, if applicable, to produce 1095-C forms.

If there is a coverage level setup for Employee+Spouse and/or Employee+Family, an additional setting with display to indicate if the spousal offer of coverage is considered conditional.

ACA requirements include indicating if the Plan Group provides Minimum Essential Coverage and/or [Minimum Value](#). These are two designations that are not determined by Dynamics Payroll Inspector and are normally provided by your health insurance broker or the provider themselves.



The screenshot shows a software window titled "Plan Group Setup" with a sub-header "EE + Spouse". The window contains the following settings:

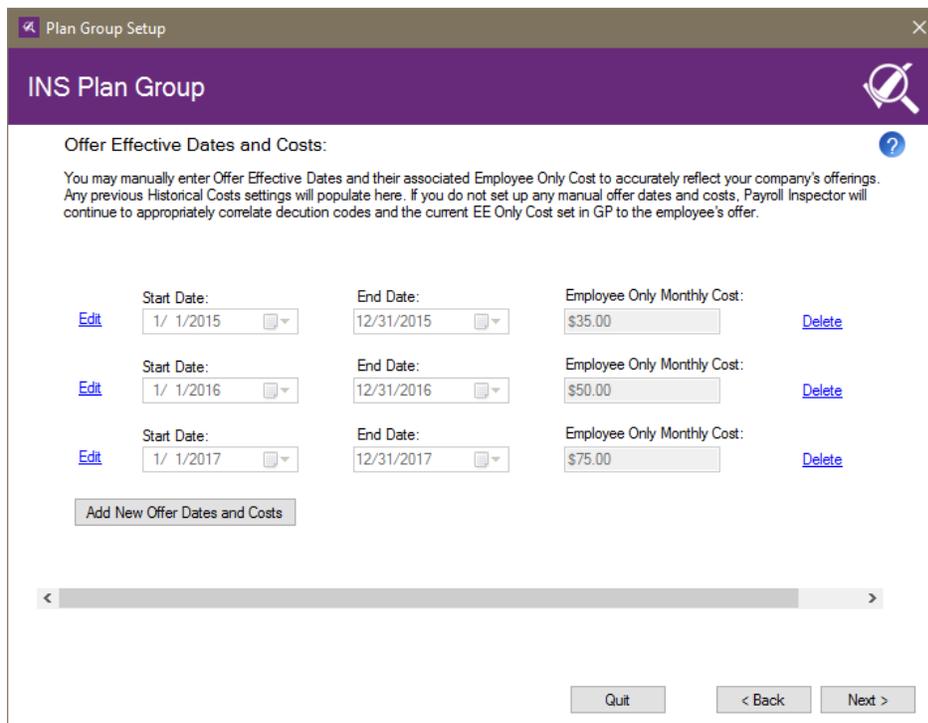
- Question: "Is this group of plans [Self-Insured Health Coverage](#) ?"
Radio buttons: Yes, No
- Question: "Does this group of plans offer a [Conditional Offer of Spousal Coverage](#) ?"
Radio buttons: Yes, No
- Text: "This group of plans covers the following Affordable Care Act Requirements:"
Checkboxes: [Minimum Essential Coverage \(MEC\)](#), [Minimum Value \(MV\)](#)

At the bottom of the window are three buttons: "Quit", "< Back", and "Next >".

4.2.4.3. Offer Effective Dates and Costs

As the employee-only costs for a group of coverage codes change, you can update the costs with this step. This is a completely optional step, as Dynamics Payroll Inspector will attempt to use the current cost for an HR Benefit code or Deduction code from the respective setup cards GP. You may wish to use this option in Dynamics Payroll Inspector, however, to specify historical costs for previous years and continue to update it every time your coverage costs change. In summary, it lets you specify a cost separately from what cost an employee's HR Benefit or Deduction code may show in GP and will override any amount that comes from GP for any employees on these plans for the set up date range. These costs will not sync back to GP.

For more information on how to use this feature, you can click the help button in the top right of this window's corner.



The screenshot shows a software window titled "Plan Group Setup" with a sub-header "INS Plan Group". Below the header is a section titled "Offer Effective Dates and Costs:" with a help icon. A descriptive paragraph explains that users can manually enter offer effective dates and associated employee-only costs to accurately reflect company offerings, overriding historical costs and GP settings. The main area contains a table with three rows of data, each with an "Edit" link on the left and a "Delete" link on the right. The columns are "Start Date", "End Date", and "Employee Only Monthly Cost". Below the table is an "Add New Offer Dates and Costs" button. At the bottom of the window are "Quit", "< Back", and "Next >" buttons.

	Start Date:	End Date:	Employee Only Monthly Cost:	
Edit	1/ 1/2015	12/31/2015	\$35.00	Delete
Edit	1/ 1/2016	12/31/2016	\$50.00	Delete
Edit	1/ 1/2017	12/31/2017	\$75.00	Delete

[Add New Offer Dates and Costs](#)

[Quit](#) [< Back](#) [Next >](#)

4.2.4.4. Auto Assigning an Offer of Coverage to Employees

This step/setting allows you to manually set certain groups of employees as being assumed to have been offered coverage for this group of plans.

This setting is beneficial if the company does not have full offer details and/or deduction/benefit codes properly assigned to employees in GP. Employees may be included in multiple Plan Groups since they may be offered several different groups of plans to choose from.

Choosing to manually include an employee a Plan Group will not override any other Plan Group that they may be included in due to benefit/deduction code assignments in GP. Assigning these manual offers will not sync back to GP, rather just be used for generating accurate 1095-C reporting in the Payroll Inspector.

Plan Group Setup

INS Plan Group

Automatically assign this Plan Group's offer of coverage to certain employees

Which employees are considered to have automatically been offered this Plan Group?

Employment Type	Employee Class	Position	Work Location
<input type="checkbox"/> All	<input type="checkbox"/> All	<input type="checkbox"/> All	<input type="checkbox"/> All
<input checked="" type="checkbox"/> FullTimeRegular	<input checked="" type="checkbox"/> Blank EmpClass	<input checked="" type="checkbox"/> ADA	<input checked="" type="checkbox"/> INTERNATIONAL-A
<input checked="" type="checkbox"/> None	<input checked="" type="checkbox"/> ACCT	<input checked="" type="checkbox"/> APA	<input checked="" type="checkbox"/> KENTUCKY
<input checked="" type="checkbox"/> PartTimeRegular	<input checked="" type="checkbox"/> ADMN	<input checked="" type="checkbox"/> ATC	<input checked="" type="checkbox"/> LOUISIANA
	<input checked="" type="checkbox"/> INST	<input checked="" type="checkbox"/> CEO	<input checked="" type="checkbox"/> OHIO
	<input checked="" type="checkbox"/> SALES	<input checked="" type="checkbox"/> CSP	<input checked="" type="checkbox"/> OHIOU
	<input checked="" type="checkbox"/> SUPP	<input checked="" type="checkbox"/> FSR	<input checked="" type="checkbox"/> PENNSYLVANIA
		<input checked="" type="checkbox"/> ISR	<input checked="" type="checkbox"/> PHILADELPHIA
		<input checked="" type="checkbox"/> PRA	<input checked="" type="checkbox"/> Primary
		<input checked="" type="checkbox"/> SUP	
		<input checked="" type="checkbox"/> TEC	

Quit < Back Save

4.2.5. Affordability Groups

Affordability Safe Harbor Groups
 Define affordability safe harbor groups for different groups of employees. These groupings will be used when determining affordability for your employees

Note: *If an employee is not assigned to an Affordability Group, the Federal Poverty Line will be used to determine affordability.*

[Create Affordability Group](#)

	Affordability Group Name	Safe Harbor Type	Employees Included in Group
Edit	Federal W-2	Federal W-2	20 of 20 employees

The Affordable Care Act has outlined three safe harbor options for determining the [affordability](#) of your coverage offer. The affordability requirement ensures that the Employee Only minimum value coverage level employee cost is no more than 9.66% (in 2016) of a full-time employee’s income. It is based on the Employee Only cost, even if the employee is enrolled in Employee+ Spouse, Employee+ Children, or Employee+ Family coverage.

- Federal W-2 Wages Safe Harbor – affordability will be determined at the end of the calendar year based on the employee’s YTD W-2 Wages (Box 1). To use this safe harbor, the employee only cost must remain a consistent dollar amount for the full calendar year.
- Federal Poverty Live Safe Harbor – affordability will be determined based on the Federal Poverty Line of \$11,880 (in 2016). The employee only cost must not be more than 9.56% of the Federal Poverty Line per month, which equates to \$95.63 per month.
- Rate of Pay Safe Harbor – affordability will be determined on a monthly basis and will be calculated based on the employee’s lowest rate of pay or salary during the plan’s start month. This safe harbor method may not be used if an exempt employee’s salary decreases at any point in the year.

An initial Affordability Group will be set up to include all employees in a Federal W-2 Wages Safe Harbor Affordability Group. You may, however, define and set up different Safe Harbor Affordability Groups for different groups of employees by employment type, employee class, position, or work location. If an employee is not assigned to an Affordability Group, the Federal Poverty Line method will be used to determine their affordability.

To create a new affordability group, click on the “Create Affordability Group” button. Otherwise, you can edit an existing one by clicking “Edit”.

4.2.5.1. Define Group

- **Name**
Give the group an appropriate name.
- **Select the categories of employees that this affordability group will apply to**

You can select groups of employees by checking one or more boxes in each of the subsections here: Employment Type, Employee Class, Position, or Work Location.

- **Select which Safe Harbor to use to calculate affordability for this group**

You can choose to use the Federal W-2 Wages, Federal Poverty Line, or Rate of Pay safe harbor to calculate affordability for this group of employees.

If you select the Rate of Pay Safe Harbor, you will then choose which pay codes to include when determining the lowest rate of pay for the employee.

! If you are unsure how each safe harbor calculates affordability, click on the “?” icon to the right of each option for more information. Please read through these carefully, as some safe harbors may not be used in certain situations.

4.3. Using the ACA Employee Coverage Widget

The widget will run automatically once you close the settings panel. If all of your full-time employees have the correct coverage levels, then the widget will come back and say that there were no issues found. Otherwise, it will notify you of some issues found that need addressing. Regardless, you can click “View Results” to see all applicable employee results. You will then be taken to a dashboard screen that gives an overview of the results and a percentage of how many employees within your company are full-time based on ACA rules.



Affordable Care Act Health Insurance Coverage

35 employees' health insurance coverage may be inadequate.

Most Recent
10/20/2016 at 1:06 AM

View Results

Affordable Care Act Coverage Results

Affordable Care Act Coverage Verification Results Reporting Year 2016

The results of the employee coverage verification are shown below.

93.10% of Full-Time employees are being offered Minimum Essential Coverage (MEC). You are required to cover at least 95% for the 2016 calendar year.

[View All Results](#)

36 Employees' health insurance coverage was inspected	27 Employees are being offered adequate coverage	3 Non Full-Time employees have been offered and enrolled in self-insured coverage
2 Employees are not being offered any coverage and are eligible	2 Eligible employees are not being offered Minimum Essential Coverage (MEC)	2 Employees are not being offered coverage for dependents
2 Employees are not being offered adequate coverage	2 Employees are not being offered Minimum Value (MV) coverage	2 Employees are not being offered Affordable Coverage

Upcoming Action Items

- 8** Employees that are now Full-Time and should be offered coverage by the start of the next stability period starting within the next month
- 16** Employees are trending 30+ hours/week in their current measurement

New Employees

- 0** New employees that should be offered coverage by the start of the next month

Note: You may be liable for penalties for any eligible employee that is not being offered coverage or coverage is inadequate. [Click here for additional IRS reference regarding ACA penalties.](#)

[Close](#)

You will be presented with a dashboard for results. This dashboard contains certain quick links that admins may be particularly interested in to work through their results or in resolving issues. The user may click to View All Results or click one of the dashboard options to view a pre-filtered results list. Red or Orange dashboard items may indicate an issue that needs to be reviewed.

The dashboard also includes some Upcoming Action Item excel reports that can assist users in forecasting for upcoming employees who should or may need to be offered coverage.

! The required percentage of full-time employees being offered minimum essential coverage in 2016 is 95%. If your company's percentage falls below 95%, it will be displayed in red, indicating an issue to address.

! Information pertaining to penalties may be accessed through the link at the bottom of the dashboard.

After clicking View All Results or a pre-filtered link, you'll be taken to the results grid.

Employee ID	First Name	Last Name	Determination	Line 14 Code	Line 15 Code	Line 16 Code	Affordable	Min. Essential	Min. Value	Dep Offered																																																				
<p>93.10% of Full-Time employees are being offered Minimum Essential Coverage (MEC) 27 Employees are being offered adequate coverage 2 Employees are not being offered adequate coverage 2 Employees are not being offered any coverage and are eligible</p> <p>Show: Only ARCHR Employees ACA Reporting Year: 2016</p>																																																														
<input type="checkbox"/>	Alistair Greene	GREE0001	Adequate Offer of Coverage				Affordable	MEC	MV	Dependents Offer, Self-Insured Waived																																																				
<p align="center">2016 1095-C Part II Employee Offer and Coverage</p> <table border="1"> <thead> <tr> <th></th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> </tr> </thead> <tbody> <tr> <td>Line 14</td> <td>1A</td> </tr> <tr> <td>Line 15</td> <td></td> </tr> <tr> <td>Line 16</td> <td></td> </tr> </tbody> </table>												Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Line 14	1A	Line 15													Line 16																							
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec																																																		
Line 14	1A	1A	1A	1A	1A	1A	1A	1A	1A	1A	1A	1A																																																		
Line 15																																																														
Line 16																																																														
<input type="checkbox"/>	Elston Guillory	GUIL0001	Inadequate Offer of Coverage				Affordable	MEC	MV	Dependents Offer, Self-Insured Waived																																																				
<input type="checkbox"/>	Yoel Harper	HARP0001	Inadequate Offer of Coverage				Affordable	MEC	MV	Dependents Offer, Self-Insured Waived																																																				

This view will allow you to filter for certain types of employees to create customized reporting. You can export the results displayed in the grid (either all results or a filtered set) to an excel report to review the results data further.

4.3.1. Understanding Results

The results are broken down into 3 columns of filterable data:

- Employee Information (Employee ID, First Name, Last Name)
- Offer Determination and Line 14/Line 16 codes (*detailed below in the expanded state*)
 1. **Adequate Offer of Coverage**
These are employees who have been offered minimum essential coverage for themselves and their dependents, and minimum value coverage that is considered affordable.
 2. **Inadequate Offer of Coverage**
these are employees who are missing affordable, minimum value coverage when they should have been offered it.

3. **No Offer of Coverage**

These are employees who are missing at least one month of minimum essential coverage when they should have been offered it.

4. **No Offer Required**

These are employees that may be considered full-time, but are currently in a Limited Non-Assessment period when an offer may not be required yet. If an employee changes to non-full-time during the year, this employee may also display in the results since you are required to report for the months in which they were full-time, but they may not currently be required to receive an offer of coverage.

5. **Non-FT Employee Enrolled in Self-Insured Coverage**

For those companies offering self-insured coverage plans only.

These are non-full-time employees who have enrolled in a self-insured plan, as indicated in the [Plan Group setup](#). You are required to report 1095-C data for these employees as well as your full-time employees.

- Plan Details
 - Affordability status
 - Minimum Essential Coverage (MEC) status
 - Minimum Value (MV) status
 - Dependents Offer of Coverage status
 - Self-Insured indication
 - Enrolled/Waived status

! If you're not seeing an employee or group of employees, it may be because your measurement period has just ended, but you haven't run a pay run yet. Dynamics Payroll Inspector needs transactions that go beyond the end of the measurement period so that it has a complete set of data with which to do its calculations. Until a pay run is ran that is after the measurement period, it will not be able to accurately calculate average hours and will not show a result.

You may also review an expanded view for each employee within the results grid that will display their current 1095-C Part II data for Lines 14-16.

4.3.2. Employee Coverage Details

You can also view a detailed description explaining what the widget was able to determine and how. To see a full breakdown of each employee's coverage details, click their Offer Determination, which is a link, within the results grid.

Affordable Care Act Coverage Details
✕

Neva Burgan
BURG001

Currently receiving an adequate offer offer

This employee is full-time as of 4/16/2016 and is in a full-time stability period that started on 8/1/2016 and ends on 12/31/2017. This employee is currently being offered minimum essential coverage which does include dependents. This employee is being offered minimum value coverage that is affordable. This employee is assigned to an affordability group using the Federal Poverty Line Safe Harbor.

2016 Employee Coverage Requirements

The chart below illustrates this employee's health insurance requirements for 2016. It is based on the employee's full-time state and represents whether or not you have fulfilled your requirements to offer this employee adequate coverage under the Affordable Care Act.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Minimum Essential Coverage Self	●	●	●	●	●	●	●	●	●	●	●	●
Minimum Essential Coverage Dependents	●	●	●	●	●	●	●	●	●	●	●	●
Minimum Value Offering	●	●	●	●	●	●	●	●	●	●	●	●
Affordable Minimum Value Offering	●	●	●	●	●	●	●	●	●	●	●	●

● Coverage Offered
● No Offer of Coverage
● No Coverage Requirement
● Expect Coverage to be Offered
● Expect No Offer of Coverage

1095-C Part II
1095-C Part III

The chart below gives a preview of what this employee's Part II (Employee Offer of Coverage) on their 1095-C form will look like. Click on a link below for more details regarding each row's contents

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Reporting Company	ARCHR											
1095-C Line 14	1H	1H	1H	1A								
1095-C Line 15												
1095-C Line 16	2A	2A	2A									

Why might there be blanks for Line 15 amounts?

Cancel
Save

4.3.2.1. Coverage Offer & Enrollment

The Coverage Offer & Enrollment section allows you to add or remove coverage offers and adjust/edit enrollment selections through this section at the employee level. This information will then be used to update the employee's

Coverage Requirements and Part II sections accordingly, based on the Plan Group(s) selected.

To add a new Plan Group Offer and Enrollment, click and choose a Plan Group from the drop-down list of all set up Plan Groups for the company. From there, you will then choose a plan code/coverage level to indicate which level the employee enrolled in. If the employee simply waived coverage, just choose the Employee Only plan to set the offer dates appropriately. To indicate enrollment, check the 'Enrolled?' checkbox for the selected row. If waived, leave unchecked.

Upon saving the Coverage Offer & Enrollment window, the employee's Requirements and Part II (lines 14-16) information will update accordingly, however these manual edits or additions will not sync down to GP.

Offered Plan Group	Enrolled	Employee Only Monthly Cost
New Group	✓	\$ 100.00
INS1		
INS2		
INS3		
INS4		
plan 2	✗	\$ 170.00
INS		
INS5		
INSBEN		

[Add Coverage Offer Enrollment](#)

2016 Employee Coverage Requirements

The chart below illustrates this employee's health insurance requirements for 2016. It is based on the employee's you have fulfilled your requirements to offer this employee adequate coverage under the Affordable Care Act.

Add Coverage Offer & Enrollment

Select a Plan Group from the drop-down list below to indicate this employee received an Offer of Coverage for this Plan Group, which includes all plans/coverage levels:

New Group

This employee already has an offer indicated for the selected Plan Group.

[Cancel](#) [OK](#)

Minimum Value Offering							
	●	●	●	●	●	●	●
Affordable Minimum Value Offering	●	●	●	●	●	●	●

● Coverage Offered ● No Offer of Coverage

Plan Offer and Enrollment

Add an Offer and Enrollment below and then select a plan code from the drop-down list to indicate the coverage level plan for which the employee was offered coverage. There may be multiple plan offers and/or enrollments during a given plan year if the employee changed coverage levels due to a Qualifying Life Event or if you follow a non-calendar year plan. You may not, however, have overlapping dates of offers within the same plan group or enrollment across all plan groups. To indicate that an employee enrolled in the offered coverage for a given date range, check the 'Enrolled?' checkbox

Plan Code	Start Date:	End Date:	Employee Only Monthly Cost:	Enrolled?
Edit INS5	1/31/2016	9/31/2016	\$95.62	<input checked="" type="checkbox"/>
Edit INS5	10/ 1/2016	12/31/2016	\$85.00	<input type="checkbox"/>

[Delete](#) [Delete](#)

[Add New Offer Dates and Costs](#)

[Cancel](#) [Save](#)

are unnecessary when combined with specific Line 14 codes (ie when Line 14 is a code 1A, there should be no Line 15 amount or Line 16 code determined, displayed, or populated on the employee’s 1095-C).

1095-C Part II **1095-C Part III**

The chart below gives a preview of what this employee’s Part II (Employee Offer of Coverage) on their 1095-C form will look like. Click on a link below for more details regarding each row’s contents

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Reporting Company	ARCHR											
1095-C Line 14	1H	1H	1H	1A								
1095-C Line 15												
1095-C Line 16	2A	2A	2A									

Why might there be blanks for Line 15 amounts?

4.3.2.4. 1095-C Part III: Covered Individuals

The 1095-C Part III tabbed section allows the adding and editing of dependents that are enrolled under the employee’s coverage as Covered Individuals. It is important to note that the Covered Individuals section is only required and meant to be reported on the employee’s 1095-C form if the employee and/or their dependents were enrolled in self-insured health coverage. Therefore, this tab selection will only be accessible if the employee is enrolled, for at least one month of the ACA Reporting Year, in a Plan Group that was indicated as being a self-insured health coverage offering on set up.

You can manually edit, add, or remove a covered individual, other than the employee, by clicking on the Covered Individual’s name. The employee’s coverage details must be adjusted within the [Coverage Offer & Enrollment](#) section.

This display directly correlates to the data that will be imported into the Year-End Forms portal at year-end to populate and report your employees’ 1095-C forms.

1095-C Part II 1095-C Part III

The chart below gives a preview of what this employee's Part III (Covered Individuals) on their 1095-C form will look like. This section includes all Covered Individuals, including the employee themselves, spouse, child(ren), and other dependents, who were enrolled in the self-insured plan for any calendar month of the calendar year. You can click on a Covered Individual's name below to edit their personal information, as well as the months in which they were enrolled.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Nancy Buchanan	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
John Buchanan	✓	✓	✓	✓	✓	✓	✓	✓				
Sally Buchanan	✓	✓					✓	✓	✓	✓	✓	✓

[Add Covered Individual](#)

4.3.2.4.1. Editing Covered Individuals

To edit a Covered Individual, click their name within the Part III grid to open the Editing module. From here, you can edit the Covered Individual's name, relationship type, SSN, DOB, and coverage dates.

Covered Individuals may be set up with multiple coverage date ranges to account for any gaps there may be in coverage in the given ACA Reporting Year.

Based on the Enrolled Coverage Dates set up, green checkmarks will be displayed for each month in which the Covered Individual was enrolled for at least one day of that month.

Edit Covered Individual

Covered Individual Details

First Name: Last Name:

Relationship: SSN:

Birthdate:

Enrolled Coverage Dates

[Edit](#) Start Date: End Date: [Delete](#)

[Add Enrolled Coverage Date](#)

1095-C Part III Preview Reporting Year: 2016

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
✓	✓	✓	✓	✓	✓	✓	✓				

5. Data Considerations

5.1. Payroll History Requirements

For any given year, Dynamics Payroll Inspector will need to be able to determine each employee's full-time status for the whole year. In order to do this, Dynamics Payroll Inspector will look at the employee's measurement period prior to the stability period that covers January 1 of the year. The longer the measurement period, the further back Dynamics Payroll Inspector will need to look at pay history. For example, if you have a 12 month measurement period that runs from 11/1 to 10/31 each year, in order for Dynamics Payroll Inspector to obtain the full-time status of employees as of January 1, 2015, Dynamics Payroll Inspector will need to look at pay history from 11/1/2013 to 10/31/2014.

Based on your measurement group setup, please ensure you have historical pay information going back far enough. If this data is not present, employee full-time statuses may not be correct.

5.2. Payroll History Hours

Dynamics Payroll Inspector uses the payroll transaction dates and units to pay (UNTSTOPY) information inside Dynamics GP to determine the number of hours employees worked. These hours are then used to determine the employee's average weekly hours and the employee ACA full-time status. This process expects UNTSTOPY in UPR30300 to be hours. If you pay employees in units other than hours (i.e. piecework, mileage, etc), you should consider using \$0 pay codes and track hours in addition to your other pay codes. \$0 pay codes can also be used for other scenarios where you need to represent hours to the ACA full-time status engine, but standard GP doesn't support this. This includes FMLA and military leave scenarios where you do not have the Dynamics HR FMLA feature.

5.3. Insurance Election Information

Whether you choose for the Employee Health Insurance Coverage Widget to inspect using Dynamics HR data or just payroll data, you will need to have your HR or deduction codes set up with the correct dates, status, and cost for the whole year. If you do not, Dynamics Payroll Inspector will likely alert you to a lapse in coverage and you will have the opportunity to complete the information then.

5.4. Historical Election Information

5.4.1. Reading from HR Benefit History

The HR module for GP will store each modification to an employee's benefits in a history table (HR2BEN10). Payroll Inspector is able to read from these dates, costs, and statuses to determine whether or a valid offer of coverage occurred within a stability period. As such, it is imperative that, whenever you modify a code for an employee, you enter the correct start and end dates, as well as costs and statuses. This is especially important when inactivating an employee HR benefit code. Make sure you update the start date to the date of inactivation when changing the code to inactive. This will allow the Coverage Tracker to properly track offers of coverage as well as when a benefit cost changes.

It is important to understand that the Coverage Tracker is looking to see that there are no gaps in coverage, so please ensure that the start date of one benefit is the day following the end date of a previous entry.

If a code is entered incorrectly, the Coverage Tracker may report that an employee did not have a valid offer of coverage or that they were enrolled in/waived coverage when the opposite occurred. GP will allow you to see your HR Benefit History and you can delete invalid or erroneous historical entries. Re-run the Coverage Tracker after modifying your history to verify your changes were correct.

Lastly, if you wish to set an HR code entry to Inactive, please be sure that you're not inactivating a date range during a stability period in which the employee should have had a valid offer. Instead, be sure that the stability period in question had either an "Active" or "Waived" status, and that the "Inactive" status you're setting starts the day after the employment or stability period ended. The Coverage Tracker looks to see if a code was marked as "Active" or "Waived", and any other status (such as "Inactive") is seen as no offer of coverage to the employee.

5.4.2. Reading from Dynamics Payroll Inspector's Payroll Deduction History

Because Dynamics GP does not store historical information about deduction and benefit codes in the Payroll module, Dynamics Payroll Inspector has been designed to store changes made to deduction or benefit codes within a table of its own. Because of this, it will only be able to see changes that were made after the Payroll Inspector was installed, and it will only store changes that it found when the Coverage Tracker is run.

This allows the Payroll deduction and benefit codes to function similarly to the HR benefits codes. Because of this, it's important to set the proper start and end dates for a deduction and benefit code within GP.

Because there is no user interface to modify this history table directly, it helps to understand how historical entries are read. The Coverage Tracker will look to see which of the historical entries is currently set on the deduction code in GP. It will then order all other historical entries based on their deduction start and end dates. Finally, it attempts to read the dates from beginning to current, ensuring there are no gaps between coverages.

An example scenario that may occur is if an employee is showing up as waived when you expected him or her to be enrolled in coverage, it may be that you've set the deduction code as Inactive for the date range where the deduction should have been active (this may occur when an employee is terminated). The way to correct this is to set the deduction code as Active, set the proper date range that the employee was enrolled, and re-run the coverage tracker to write this to the history table. Then set the code to Inactive in GP, set a date range with a start date a day after the previous end date, and re-run the coverage tracker. You should now see correct coverage reporting for this employee.

5.5. Dependent Elections

If your company offers self-insured benefits to employees, you will be required to send detailed information to the IRS about which individuals were covered under these plans. This requires Dynamics Payroll Inspector to identify each employee dependents and which plans that were enrolled in with the employee. Dynamics Payroll Inspector gets this information from APR_APR00610 (Dynamics GP Advanced HR is required for this table). If you do not have Advanced HR, Dynamics Payroll Inspector offers the ability to add and edit dependent benefit election information. Dynamics Payroll Inspector does not use UPR00904 as it does not provide enough information for 1095-C reporting.

5.6. FMLA / Jury Duty / Military / Summer Break Leave

If you have employees who took leave for FMLA, jury duty, military deployment or summer break (educational institutions only) purposes, there are two options for representing this in your data such that Dynamics Payroll Inspector will handle them properly. If you do nothing, Dynamics Payroll Inspector will assume the employee did not work and thus incorrectly reduce the hours for the employee. Therefore, it is important you do one of these two options. First, you can use the Human Resources FMLA feature (if available) to indicate the dates the employee was out for any of these purposes. Dynamics Payroll Inspector will treat this time as not-applicable for the look back measurement method. Second, you may process transactions using a \$0.00 pay code during the time the employee is out in order to credit the employee with hours as if he is working.

6. Payroll Only Considerations

This section is intended to assist clients who do not have GP HR to be able to use Payroll in such a way that Dynamics Payroll Inspector will accurately report health insurance coverage.

Dynamics Payroll Inspector supports clients who do not use Dynamics GP HR and only have payroll information. Payroll, however, does not inherently support all of the information required for doing ACA inspections. Therefore, Dynamics Payroll Inspector makes certain assumptions in order to obtain the information necessary and then stores much of the non-payroll information in its own tables.

! Both HR and Payroll-only modes of Dynamics Payroll Inspector use the current setup information. Payroll historical transactions are not considered in the coverage inspection logic.

6.1. Interpretations

Health Insurance Offered and Enrolled – if Dynamics Payroll Inspector sees a deduction code marked as MEC or MEC/MV associated to the employee, Dynamics Payroll Inspector interprets this as the employee was offered and enrolled in that health plan for the dates listed as the cost listed.

Health Insurance Offered and Waived – if Dynamics Payroll Inspector sees a deduction code marked as MEC or MEC/MV associated to the employee *as inactive*, Dynamics Payroll Inspector interprets this as the employee was offered and waived that health plan for the dates listed as the cost listed.

No Offer – if Dynamics Payroll Inspector sees a deduction code marked as MEC or MEC/MV but no association with the employee, Dynamics Payroll Inspector interprets this as the employee was not offered the health insurance represented by this code.

! When you link codes together in the setup, Dynamics Payroll Inspector will interpret an offer for one code in a group to be an offer for all codes in the group. This prevents you from having to manage each code in a group.

6.2. Common Scenarios

Enrolled in the same plan at same cost all year – set the code cost and dates to cover the whole year. Make sure the code is marked as active.

Waived plan all year – set the code cost and dates to cover the whole year. Make sure the code is marked as inactive.

Include dependents – If you need to add dependents because the insurance is self-insured, add them inside Dynamics Payroll Inspector.

Employee coverage change in the middle of the year – if the employee changes coverages in the middle of the year, set the end date on the old coverage and add the appropriate deduction code to him with the new start date.

Employee enrolled to waived status changes in the middle of the year – change the inactive flag in Dynamics GP or change the Enrolled/Waived status in Dynamics Payroll Inspector for the appropriate code. Dynamics Payroll Inspector will capture the history of changes and apply the change to the employee while realizing the history.

Employee premium amounts change in the middle of the year – if the premium amount changes, be sure to set the end date for the old cost on the day before the new cost takes effect. Save the deduction amount and run the Coverage Tracker. Then modify the deduction code to have a new start date on the day the cost takes effect, save the deduction change, and re-run the Coverage Tracker. The Payroll Inspector's payroll deduction history table will see the change in cost, with the new dates in place, and reflect these properly on the employee's 1095-C.

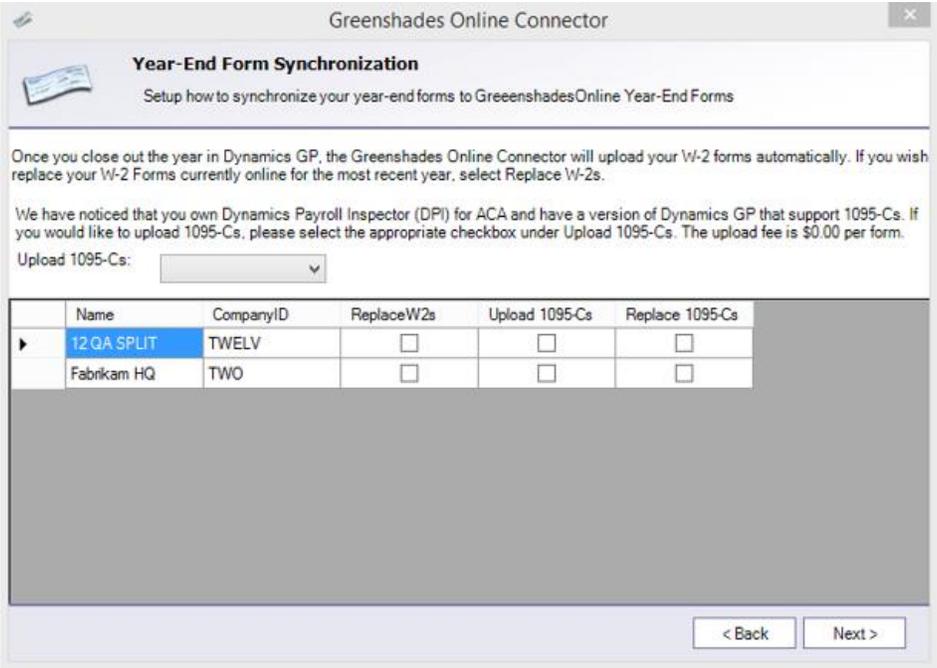
7. Creating 1095-Cs

Dynamics Payroll Inspector is designed to track and manage your ACA compliance throughout the year. This ensures you have the most accurate and complete information to report to the IRS at the end of the year if you have been keeping up with the alerts and taking the necessary recommendations.

When it comes to the end of the year, you should expect to use the Dynamics Payroll Inspector data to create your 1095-Cs. You should not need external data unless you do not have all of your employees in Dynamics GP. To do this, you have two options depending on whether you own GreenshadesOnline Paystubs or not.

7.1. GreenshadesOnline Paystubs Client

If you are a GreenshadesOnline Paystubs client, you will create your 1095-Cs on GreenshadesOnline Year-End Forms. The GreenshadesOnline Connector will assist you with uploading the information from Dynamics Payroll Inspector to the Year-End Forms portal. This portal offers the ability to view each of your 1095-Cs, edit employee and form information, electronically distribute the forms to your employees, email reminders to employees, print and mail the forms through Greenshades, and electronically file them to the IRS.

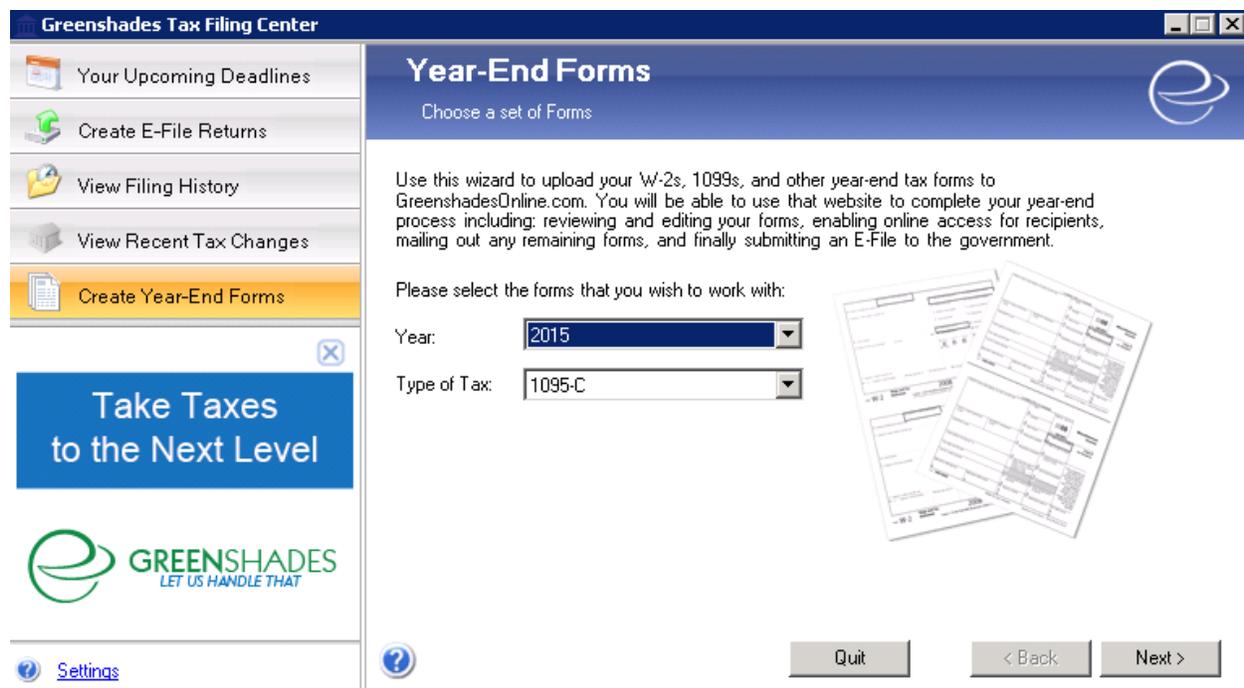


The screen shot above is found in the GreenshadesOnline Connector wizard. To upload 1095-Cs, check the box under Upload 1095-Cs for any of the companies you wish to upload. There is a per form fee for this upload that will be invoiced later.

After the synchronization is finished, you will be able to login to [GreenshadesOnline Year-End Forms](#) and access your 1095-Cs.

7.2. Greenshades Tax Filing Center Client

If you are not a GreenshadesOnline Paystubs client, you will use the Greenshades Tax Filing Center to create and electronically file your 1095-Cs (and 1094-C).



The screenshot shows the 'Greenshades Tax Filing Center' window. On the left is a navigation menu with options: 'Your Upcoming Deadlines', 'Create E-File Returns', 'View Filing History', 'View Recent Tax Changes', and 'Create Year-End Forms' (highlighted). Below the menu is a blue button that says 'Take Taxes to the Next Level' and the Greenshades logo with the tagline 'LET US HANDLE THAT'. At the bottom left of the menu is a 'Settings' link. The main area is titled 'Year-End Forms' and 'Choose a set of Forms'. It contains a paragraph of instructions: 'Use this wizard to upload your W-2s, 1099s, and other year-end tax forms to GreenshadesOnline.com. You will be able to use that website to complete your year-end process including: reviewing and editing your forms, enabling online access for recipients, mailing out any remaining forms, and finally submitting an E-File to the government.' Below this is the prompt 'Please select the forms that you wish to work with:'. There are two dropdown menus: 'Year:' set to '2015' and 'Type of Tax:' set to '1095-C'. To the right of these menus is an image of several tax forms. At the bottom right of the main area are three buttons: 'Quit', '< Back', and 'Next >'. There are also help icons (question marks) in the bottom left and right corners of the main area.

Within the Tax Filing Center, you have two options:

1. Use the Tax Filing Center to create and upload your 1095-Cs on the GreenshadesOnline Year-End Forms portal. This portal offers the ability to view each of your 1095-Cs, edit employee and form information, electronically distribute the forms to your employees, email reminders to employees, print and mail the forms through Greenshades, and electronically file them to the IRS.
2. Use the Tax Filing Center to review your 1095-C data, edit it if necessary, and electronically file your 1095-Cs to the IRS.

If you wish to do option 1, launch the Greenshades Tax Filing Center and click the Year-End Forms option. This will launch a wizard which will allow you to upload your forms to



the Year-End Forms portal. You can then login to [GreenshadesOnline Year-End Forms](#) and access your 1095-Cs.

If you wish to do option 2, launch the Greenshades Tax Filing Center and click the E-File option. This will launch a wizard which will allow you to build and submit a 1095-C electronic file to the IRS (this includes 1094-C data).

8. Definitions

8.1. Hour of Service

Reference: <https://www.irs.gov/Affordable-Care-Act/Employers/Identifying-Full-time-Employees>

An hour of service is:

- Each hour for which an employee is paid, or entitled to payment, for the performance of duties for the employer, and
- Each hour for which an employee is paid, or entitled to payment by the employer for a period of time during which no duties are performed due to vacation, holiday, illness, incapacity (including disability), layoff, jury duty, military duty or leave of absence.

Exclusion from the definition of hour of service is provided for services performed in certain capacities, which are not counted as hours of service for purposes of the employer shared responsibility provisions:

- Volunteer employees – Hours of bona fide volunteer service for a government entity or tax-exempt organization do not count as hours of service.
- Students performing work-study – Hours of service do not include hours performed by students as part of the federal work study program or a substantially similar program of a state or political subdivision.
- Members of religious orders – Until further guidance is issued, under certain circumstances, a religious order is permitted to not count as an hour of service work performed by an individual who is subject to a vow of poverty. For this exclusion to apply, the employee must be a member of the religious order and must be performing tasks that are usually required of active members of that order.
- Compensation that is not U.S. source income – Hours of service do not include hours for which an employee receives compensation that is taxed as income from sources outside the United States (generally meaning certain work overseas).

8.2. Minimum Value

Reference: <https://www.irs.gov/Affordable-Care-Act/Employers/Minimum-Value-and-Affordability>

An employer-sponsored plan provides minimum value if it covers at least 60 percent of the total allowed cost of benefits that are expected to be incurred under the plan. See [Notice 2014-69](#) for additional guidance regarding whether an employer-sponsored plan provides minimum value coverage if the plan fails to

substantially cover in-patient hospitalization services or physician services. Under [proposed regulations](#) upon which taxpayers may rely, employers generally must use a [minimum value calculator](#) developed by HHS to determine if a plan with standard features provides minimum value. Plans with nonstandard features are required to obtain an actuarial certification for the nonstandard features. The proposed regulations also describe certain safe harbor plan designs that will satisfy minimum value.

8.3. Affordability

Reference: <https://www.irs.gov/Affordable-Care-Act/Employers/Minimum-Value-and-Affordability>

Coverage for an employee under an eligible employer-sponsored plan is affordable if the employee's required contribution for self-only coverage does not exceed 9.5 percent of the taxpayer's household income for the taxable year.

Because employers are not likely to know the household income of their employees, there are three safe harbors that an employer may use to determine affordability for purposes of the employer shared for purposes of determining the employee's eligibility for the premium tax credit.) In general, under these employer shared responsibility affordability safe harbors, employers are allowed to use Form W-2 wages, an employee's rate of pay, or the federal poverty line, instead of household income in making the affordability determination. For more information about the safe harbors, see the IRS [Question and Answer page](#) and section 54.4980H-5 of the [ESRP regulations](#).

8.4. Look-Back Measurement Method

Reference: <https://www.federalregister.gov/articles/2014/02/12/2014-03082/shared-responsibility-for-employers-regarding-health-coverage#h-11>

A method where employers may determine the status of an employee as a full-time employee during a future period (referred to as the stability period), based upon the hours of service of the employee in a prior period (referred to as the measurement period). The look-back measurement method for identifying full-time employees is available only for purposes of determining and computing liability under section 4980H and not for purposes of determining status as an applicable large employer.

Under the look-back measurement method for ongoing employees, an applicable large employer member determines each ongoing employee's full-time employee status by looking back at a standard measurement period of at least three

months but not more than 12 months, as determined by the employer. The applicable large employer member determines the months in which the standard measurement period starts and ends, provided that the determination must be made on a uniform and consistent basis for all employees in the same category. If the applicable large employer member determines that an employee was employed on average at least 30 hours of service per week during the standard measurement period, then the applicable large employer member treats the employee as a full-time employee during a subsequent stability period, regardless of the employee's number of hours of service during the stability period, so long as the worker remains an employee.