



selerix

ACA Reporting Tool

ACA Guide

2022 REVISED EDITION

Get the most out of the Selerix ACA component with our new and improved user guide.

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selerix

ACA Reporting Tool and User Guide

Thank you for choosing the Selerix ACA reporting tool to help your clients tackle the rigorous demands of the ACA mandate, quickly and easily. Our ACA component integrates within the BenAdmin system automated process for affordability calculations, transaction-based IRS code generation, and powerful Lookback Monitoring.



ACA + BenAdmin in a Single, Trusted Interface

Save time and resources by integrating the best of both worlds - in **one**, convenient interface.



Authentic ACA Functionality

Automated affordability calculations, transaction-based IRS code generation and powerful hours of service measurement capabilities.



Beginning with the End in Mind

File electronically with the IRS with a click of a button. Receive automatic IRS status updates. Track and process corrections and submissions from one convenient interface.

TABLE OF CONTENT

SECTION 1: GETTING STARTED	1
SECTION 2: ACA MANAGEMENT	4
SECTION 3: ACA FORMS AND FILING	6

Section 1: Getting Started



Accessing the Selerix ACA Component

Access the Selerix ACA component by logging into the BenSelect admin site dashboard. BenSelect users will use their current credentials. New users will need credentials to access.

Select the Selerix ACA option from the toolbar located on the dashboard and click Setup.

Before you get started...

Visit the **Selerix ACA Resource Studio** for access to complete step by step guides and resources designed to help you navigate the ACA forms and filing process using the integrated ACA component.

From Best Practices for case structure to completing the ACA Setup configuration for your clients, these resources will make using the Selerix ACA component as easy as possible.

Section 1: Getting Started

Discovery and Setup

Employer engagement is vital for gathering the necessary information to complete the ACA Setup with the details required for ACA reporting.



Home Enrollment Reports Access Case Setup **ACA** Data Management Session Billing

Setup Workflow Dashboard

ACA Setup

Product Configurations

Product	Plan	Benefit Plan Year	MEC	MV	Co...	Self or Fully Insured
Kaiser HMO (Kaiser Permanente)		2018, 2019, 2020, 2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Self-Insured
Blue Cross PPO (Blue Cross / Blue Shield)		2018, 2019, 2020, 2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Self-Insured
Choice Plus Definity HSA (United Healthcare)		2018, 2019, 2020, 2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Self-Insured

Employer Identification Numbers

Entity Name	Entity Type	EIN
Blue Cross / Blue Shield	Carrier	
National Health Network ACA Demo Case	Employer	36-1234567

State Mapping

Company	EIN	Entity Type	States
Blue Cross / Blue Shield	121212121	Carrier	
National Health Care LLC	361234567	Employer	

Contact Information

Company	EIN	Entity	Type	
National Health Care LLC	361234567		Employer	<input checked="" type="checkbox"/>
Blue Cross / Blue Shield	121212121		Carrier	<input checked="" type="checkbox"/>

Company Name: National Health Care LLC

Country: USA

Street Address: 2851 Craig Dr.

Section 1: Getting Started



Importance of Case Structure

ACA reporting is done on a calendar year (Jan - Dec) basis. Ensure a multiyear case setup and includes the prior plan **AND** most recent plan year are build.

Multiyear Setup: Current plan **and** prior plan years are built within the case for Non-Calendar Year Benefit Plans (e.g.: Sept 1st)

Best Practice: Build both current and prior plan years to ensure the required elements are captured for the “calendar year” period which is required for ACA reporting. **Note:** *Multiyear case setup is also maintained moving forward to accommodate all historical benefit plan years within a single case structure. This would also be applicable moving forward for Calendar Year plans.*

Example:

Prior Plan Year: 3/1/2021 – 02/28/2022

New Plan Year: 3/1/2022 – 02/28/2023

Case Info

Plan Year Begins	Active	
03/01/2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>
03/01/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Both prior 03/01/2021 - 02/28/2022 and new 03/01/2022 - 02/28/2023 benefit plan years would be required to capture all the required details within the 2022 calendar year (January - December) for accurate ACA Reporting.

ACA Setup: Be sure to update the ACA Setup Product Configuration, EIN, Contact Information and Classification Changes.

Product Configurations

Product	Plan	Benefit Plan Year	MEC	MV	Cond...	Self or Fully Insured
Blue Cross PPO (Blue Cross / Blue Shield)	03/01/2021 - 02/28/2022	2018, 2019, 2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Self-Insured
Choice Plus Definity HSA (United Healthcare)	03/01/2022 - 02/28/2023	2022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Self-Insured

Best Practice: Verify all Products for the ACA reporting calendar year are elected.

For non-calendar benefit plan year (e.g.: March 1st) cases you will need to maintain the medical plan(s) offered during the calendar year which can often include prior and current benefit plan years.

Example: Benefit Plan Year March 1st

Prior Medical PPO Plan Offered: 3/1/2021 – 2/28/2022 **AND** New Medical Choice HSA Offered: 3/1/2022 – 2/28/2023

Ensure locations are in sync with the company structure.

Locations: Locations should be created based on each unique Employer Identification Number (EIN) not by “department” unless departments are required for billing. Ensuring the location structure is in sync with the organizational structure allows the group to generate reports and a variety of other system features more effectively. In addition, those employers with the ACA component engaged require reporting by unique EIN, so it is vital employees are placed in the EIN location consistent with the EIN identified on their W2.

Best Practice: Create the location based on each unique EIN. We recommend asking employers to verify if all W2s produced for employees use the same EIN or if they have employees whose W2s fall under different EINs.

Employer locations often operate independently of each other, utilizing separate information systems, defining their own job classes and departments, and even determining plan and payer product availability. [Instructions](#)

Locations	Location Groups	Departments	Properties
ALABAMA ALASKA ARIZONA			

Location Name: ALABAMA

Location Code: ALABAMA

Location Logo:

Location EIN: 00-0001234

Section 2: ACA Management



Selerix ACA Reports

The Selerix ACA component offers two distinct reports for assisting employers maintain ACA compliance, the **ACA Summary Report** and the **ACA Lookback Report**. The reports will give employers a streamlined method to review their data.

Select the Reports option from the toolbar located on the dashboard and click Run Reports.

The screenshot displays the Selerix ACA Reports dashboard. The navigation bar includes: Home, Enrollment, Reports, Access, Case Setup, ACA, Data Management, Session, and Billing. The 'Reports' dropdown menu is open, showing options: Run Report, Create Report, Received Reports, and Sent Reports. The 'Run Report' option is circled in red. Below the navigation bar, the page title is 'National Health Plan Team Demo Case - Dashboard'. The main content area features a search bar for employees, a list of employee attributes (SSN, EID, Name, Job Class, Emp Status, Enroll Status), and buttons for New, Edit, Life Event, and Enroll. A central dashboard widget shows a pie chart with the following data: 44 Complete (blue), 43 Incomplete (purple), and 737 Not Begun (orange). Above the pie chart are three status indicators: 0 Days Left, 0 Follow Up, and 0 Pending. To the right, there is a list of report types: ICHRA Plan, Medical, 1095-C Form Electronic Receipt Acknowledgment, and buttons for New, Rules, Eligibility, and Rates.

Section 2: ACA Management



ACA Summary Report

This report offers employers a proactive approach to their data management. Allowing employers a periodic review of the IRS codes associated with Lines 14 and 16 which represent Part II of the Form 1095-C provided to employees.

Part I		Line 14 - Offer of Coverage													
Employee		Line 14: All 12	Line 14: Jan	Line 14: Feb	Line 14: Mar	Line 14: Apr	Line 14: May	Line 14: June	Line 14: July	Line 14: Aug	Line 14: Sep	Line 14: Oct	Line 14: Nov	Line 14: Dec	Line 15: All 12
Employee Name	Employee SSN														
Iris Aderholt	998-78-0983	1A													
Juanita Alexander	998-78-0535	1A													
Nancy Amash	998-78-0761	1E													100.00
Sheryl Amash	998-78-1249		1E	1E	1E	1E	1H	1H	1H	1H	1H	1H	1H	1H	100.00
June Amodei	998-78-0536	1E													100.00
Melinda Amodei	998-78-0048	1A													100.00
Alta Andrews	998-77-9851	1E													100.00
Grady Andrews	998-78-0827	1E													100.00
Dora Ayotte	998-78-1530	1E													100.00
Gwendolyn Ayotte	998-78-1042	1A													
Sybil Bachmann	998-78-1527	1A													
Bertha Bachus	998-78-1568	1E													100.00
Dale Bakwin	998-78-0303	1E													100.00
Bette Barber	998-78-1195	1E													100.00
Bianche Barber	998-78-0219	1A													
Claire Barber	998-77-4363	1A													
Lynda Barletta	998-78-0390	1A													
Oscar Barr	998-78-0696	1A													
Gladys Barrow	998-78-1149	1E													100.00
Ira Barton	998-78-1422	1A													
Joanne Bass	998-78-0447	1A													
Pat Baucus	998-78-0459	1A													
Dianne Beatty	998-78-1253	1A													
Peter Beatty	998-78-0277	1E													100.00
Douglas Begich	998-78-0719	1E													100.00
Penny Begich	998-77-4375	1E													100.00
Wilma Begich	998-78-0231	1A													
Kathy Benishek	998-78-0490	1E													100.00

ACA Lookback Report

Enables employer to forecast and monitor variable hour trends and eligibility. Measure, Monitor and Manage eligibility through automated reports and identify changes at-a-glance.

Employee Information				Pay History		Measurement Period			Eligibility Trend				Audit		Contact Information								
Employee SSN	EID	Last Name	First Name	Location	Job Class	Hire Date	Status	Regular Hours	Last Pay Date	From Date	To Date	Weeks to date	Weeks remaining	Total	Required	Avg Hours Per Week	Avg Needed per Week	Trend	Gaps	Overlaps	Address1	Address2	City
998-79-7894	80121	Davis	Allen	ALABAMA	Part-time	02/01/2015	Active	17.50	02/27/2015	02/01/2015	01/31/2015	5.86	48.34	52.00	30	4.54	32.04	65.12%	0	0	0815 Kona St		Dr
998-99-7451	638052	Vasquez	Joe	ALASKA	Part-time	12/15/2014	Active	286.00	02/27/2015	12/20/2014	12/19/2014	10.00	42.00	52.00	30	28.60	30.33	95.33%	0	0	02326 Durant Dr.		An
998-78-1195	61196	Barber	Bette	KENTUCKY	Full-time, hourly	09/02/2003	Active	1,864.00	02/27/2015	09/01/2014	02/28/2015	52.00	0.00	52.00	30	35.85	N/A	19.49%	0	0	0188 Todd St		Pr
998-77-5899	79893	Conaway	Nise	MASSACHUSETTS	Part-time	05/01/2003	Active	1,880.00	02/27/2015	05/01/2014	02/28/2015	52.00	0.00	52.00	30	28.46	N/A	94.57%	0	0	016 NW Stephany Blvd		Bo
998-78-0120	60721	Castor	Ben	UTAH	Part-time	04/30/2003	Active	1,366.00	02/27/2015	03/01/2014	02/28/2015	52.00	0.00	52.00	30	35.85	N/A	13.48%	0	0	08 NW Deirdra Blvd		Sal
998-78-0355	60336	Scott			Full-time, salaried	02/71/2003	Active	1,864.00	02/27/2015	02/28/2015	02/28/2015	52.00	0.00	52.00	30	35.85	N/A	13.33%	0	0	014 Lantana		Bo
998-77-2911	29912	Leutenberg	Fredie	IDAHO	Part-time	02/26/2003	Active	1,864.00	02/27/2015	03/01/2014	02/28/2015	52.00	0.00	52.00	30	35.85	N/A	19.49%	0	0	013 N Marlene Hwy		Bo
998-78-0368	60389	Werstrop	Sherril	IDAHO	Full-time, hourly	02/16/2003	Active	1,480.00	02/27/2015	03/01/2014	02/28/2015	52.00	0.00	52.00	30	28.46	N/A	94.67%	0	0	013 NW Chip Blvd		Bo
998-78-0761	60762	Amash	Nancy	NEVADA	Full-time, hourly	02/03/2003	Active	1,864.00	02/27/2015	03/01/2014	02/28/2015	52.00	0.00	52.00	30	35.85	N/A	19.49%	0	0	02 Talisa Ave		Ca
998-78-0392	60393	Chembiss	Etta	PENNSYLVANIA	Part-time	02/03/2003	Active	1,864.00	02/27/2015	03/01/2014	02/28/2015	52.00	0.00	52.00	30	35.85	N/A	19.49%	0	0	019 NW Milan Blvd		Ha
998-78-0133	60134	Costa	Estelle	MARYLAND	Full-time, salaried	02/03/2003	Active	2,088.00	02/27/2015	03/01/2014	02/28/2015	52.00	0.00	52.00	30	40.00	N/A	83.33%	0	0	015 NE Armita Hwy		An

Section 3:

ACA Forms and Filing



Selerix ACA Workflow

The Selerix ACA Workflow is aimed to simplify the complexity of 1095-C Form generation and IRS AIR Filing with one-click! This is achieved by offering a step-by-step method for managing and archiving data used within this process.

Select the Selerix ACA option from the toolbar located on the dashboard and click Workflow.

The screenshot shows the Selerix ACA Workflow dashboard. The top navigation bar includes Home, Enrollment, Reports, Access, Case Setup, ACA, Data Management, Session, and Billing. The ACA dropdown menu is open, showing Setup, Workflow (highlighted with a red circle), Dashboard, and Errors. The main content area displays 'National Health ACA Team Demo Administrative Site' with a search bar, a list of employee fields (SSN, EID, Name, Job Class, Emp Status, Enroll Status), a pie chart showing 44 Complete, 43 Incomplete, and 737 Not Begun, and a list of ACA-related items like ICHRA Plan, Medical, and 1095-C Form Electronic Receipt Acknowledgment.

The ACA Workflow offers an easy to navigate interface that incorporates 1095-C Form generation and electronic filing to the IRS with a click of a button.

Section 3:

ACA Forms and Filing



Generate 1095s

The ACA Workflow offers one-click 1095-C Form generation.

ACA Workflow EIN: 12-3456789 Tax Year: 2022 Filing: Federal

National Health Care Inc.

▶ Review and Approve Approved ✓

▶ Generate 1095s Distributed ✓

! Your 1095 forms been successfully generated. You can click the [Download](#) link to review, print, and manually distribute. When you are ready, click the [Continue](#) button to begin the process of submitting AIR files to the IRS.

1095C Form Archive	Distributed ✓	
	Generated: 7/19/2022 10:01:13 AM	Download
	Generated By: Kelli Smith	Recipients

[Skip](#) [Continue](#)

▶ Submit AIR Pending !

▶ AIR Submission Status Pending !



IRS Electronic Filing

The ACA Workflow offers electronic filing to the IRS. Receive status notifications automatically when the IRS processes the submission.

ACA Workflow EIN: 12-3456789 Tax Year: 2022 Filing: Federal

National Health Care Inc.

▶ Review and Approve Approved ✓

▶ Generate 1095s Distributed ✓

▶ Submit AIR Pending !

! Now that you have approved your **ACA Summary** and generated your 1095 forms, you are ready to submit your ACA forms electronically to the IRS.

STEP 1: It is important to perform a final check or review to ensure that the ACA Summary matches the intended data set. You can review the file by clicking the [Download](#) link. You are also able to take a final look at the parameters utilized to create your summary by clicking on the [Parameters](#) link.

STEP 2: Once you are ready to submit your AIR files to the IRS, click the [Run and Submit](#) button. This will initiate the process of generating and submitting your AIR Files electronically to the IRS.

Note: Once you click the [Confirm](#) button at the bottom of the confirmation dialog, there will be no recall opportunity.

You will need to perform this step for each of your EIN's by utilizing the drop-down in the upper right-hand corner of the page.

ACA Summary EIN: 36-1234567_regenerated	Ready for Submission ✓	
Generated: 6/1/2022 11:28:07 AM	Download	
Generated By: Kelli Smith	Parameters	
Qualified: 6/1/2022 11:31:14 AM	Approved: 6/1/2022 11:31:40 AM	
Qualified By: Kelli Smith	Approved By: Kelli Smith	Run and Submit

Section 3: ACA Forms and Filing



ACA Workflow - Pulling it all Together

- The ACA Workflow is an end-to-end ACA solution that integrates:
- Functionality and convenience
 - Manage corrections
 - Create revised reports and forms based on corrections
 - Capture corrections to submit revised electronic AIR files to the IRS

ACA Workflow EIN: 12-3456789 Tax Year: 2022 Filing: Federal

National Health Care Inc.

▶ Review and Approve	APPROVED ✓
▶ Generate 1095s	DISTRIBUTED ✓
▶ Submit AIR	APPROVED ✓
▶ AIR Submission Status	COMPLETE WITH ERRORS ✓
▶ Upload Corrections	COMPLETE ✓
▶ Document Archives	

IMPORTANT ACA DEADLINES

<p>Employee copy distribution</p> <p><u>January 31, 2023</u></p>	<p>E-filing</p> <p><u>March 31, 2023</u></p>	<p>Paper Filing</p> <p><u>February 28, 2023</u></p>
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✉ Questions? Please contact acasupport@selerix.com for assistance