

How to Update Employee Classification Data for ACA

If there is a retroactive change or correction to census data impacting ACA classification, it needs to be updated in the ACA section(s) of PlanSource after the census data has been updated. The accuracy of the ACA module relies heavily on accuracy of this data.

Access the Employee's profile in PlanSource. Navigate to the **ACA Employee Data** page. Use the Edit links to update the appropriate data within this page.

Scenario: An employee moves from a full-time Salaried position to a part-time hourly position. This change was made in PlanSource on 7/1/2019; but the change actually occurred on 5/15/2019.

Scroll to the **ACA Classifications Periods** section and select **Edit** next to the initial classification period.

ACA Classification Periods

There are the classification periods for the subscriber.

<input type="checkbox"/>	Starts On	Ends On	Is Expected FT?	Is Seasonal?	Is in Multi-Employer Plan?	Hours Type	Measurement Type	Initial Measurement Configuration	Standard Measurement Population	Manual	Action
<input type="checkbox"/>	08/01/2015	06/30/2019	Yes	No	No	Weekly Equivalency	Look Back	All Employees BEG_OF_NEXT_CAL_MO 12	All Employees	Yes	Edit
<input type="checkbox"/>	07/01/2019		No	No	No	Actual	Look Back	All Employees BEG_OF_NEXT_CAL_MO 12	All Employees	Yes	Edit

Make the necessary update to the Ends On date and select **Save**.

ACA Employee Classification Period

Employee Classification Period

Classification Period

The ACA engine detects changes to "Expected full-time", "Seasonal" and "Hours Equivalency". Each time a change occurs, it creates a period. If you wish to adjust an entry you can edit it here.

Starts On*

Ends On

If this period is active leave "Ends On" blank.

Expected Full-Time?

Any employee expected to work 30+ hours per week must be categorized as "expected full-time". Unless they are seasonal, they end of their non-assessment period.

Seasonal?

If an employee is seasonal, they do not need to be offered benefits upon hire even if they are expected to work 30+ hours per week.

In Multi-Employer Plan?

Next, select **Edit** for the new classification period.

ACA Classification Periods

There are the classification periods for the subscriber.

<input type="checkbox"/>	Starts On	Ends On	Is Expected FT?	Is Seasonal?	Is in Multi-Employer Plan?	Hours Type	Measurement Type	Initial Measurement Configuration	Standard Measurement Population	Manual	Action
<input type="checkbox"/>	08/01/2015	06/30/2019	Yes	No	No	Weekly Equivalency	Look Back	All Employees BEG_OF_NEXT_CAL_MO 12	All Employees	Yes	Edit
<input type="checkbox"/>	07/01/2019		No	No	No	Actual	Look Back	All Employees BEG_OF_NEXT_CAL_MO 12	All Employees	Yes	Edit

Make the necessary update to the Starts On date and select **Save**.

ACA Employee Classification Period

Employee Classification Period

Classification Period

The ACA engine detects changes to "Expected full-time", "Seasonal" and "Hours Equivalency". Each time a change occurs, it updates the classification period. If you wish to adjust an entry you can edit it here.

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In Multi-Employer Plan?

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