

ACA Medical Offer Confirmation Process

There are times when PlanSource is unable to confirm whether an offer of coverage has been extended to an eligible employee. In those cases, the employer is responsible for manually confirming whether the employee was notified of their opportunity to enroll.

Using the navigation menu, select **ACA Medical Offers** from under the Data & Tools heading. Complete the criteria at the top of the medical offers page.

Medical Offers

Starts On:	From	<input type="text" value="01/01/2019"/>	Thru	<input type="text" value="12/31/2019"/>	
Population:	<input type="text"/>	Approval:	<input type="text"/>	First name:	<input type="text"/>
Origin:	<input type="text"/>	Manual:	<input type="text"/> Manually Accepted Auto Accepted Not Accepted Rejected	Last name:	<input type="text"/>
Test Employees:	<input type="text" value="No"/>	Eligible:		SSN:	<input type="text"/>
<input type="button" value="Search"/>					

The **From** date should be completed by entering the plan year start date that includes at least one day in the reporting year. The **Thru** date should be the plan year end date that includes at least one day in the reporting year. In the **Approval** field, select **Not Accepted** from the drop down selections. An approval status of Not Accepted means that no action has been taken yet for that employee.

For example, if reporting for 2019 and your medical benefit plan year runs from 1/1 – 12/31, the dates entered will be 1/1/2019 thru 12/31/2019. If reporting for 2019 and your medical benefit plan year runs from 7/1 – 6/30, the dates entered would be 7/1/2018 – 6/30/2020. This is because both the 7/1/2018 – 6/30/2019 and 7/1/2019 – 6/30/2020 plan years contain at least one day in the 2019 calendar year.

Apply Action to all 68 records found

	Employee	Origin	Plan Name	Offer		Enrollment		Approval	Eligible For Offer	Offer Calc Date	Max Tier Offered	Self-Only Employee Share	Provides Minimum Value?	Is MEC?	Manual
				Starts On	Ends On	Starts On	Ends On								
<input type="checkbox"/>	Agnew, Buffy	Open Enrollment	Personal Choice pPO	01/01/2019	12/31/2019			Not Accepted	Yes	02/06/2019	ALL	400.0	No	No	No
<input type="checkbox"/>	Brown, Ella	Open Enrollment	Personal Choice pPO	01/01/2019	12/31/2019			Not Accepted	Yes	02/06/2019	ALL	400.0	No	No	No
<input type="checkbox"/>	Clyde, Bonnie	Open Enrollment	Personal Choice pPO	01/01/2019	12/31/2019			Not Accepted	Yes	02/06/2019	ALL	400.0	No	No	No
<input type="checkbox"/>	Doyle, Lauren	Open Enrollment	Personal Choice pPO	01/01/2019	12/31/2019			Not Accepted	Yes	02/06/2019	ALL	400.0	No	No	No
<input type="checkbox"/>	Eastwood, Clint	Open Enrollment	Personal Choice pPO	01/01/2019	12/31/2019			Not Accepted	Yes	02/06/2019	ALL	400.0	No	No	No

Accept: Pressing Accept will move selected offers to the "accepted" status. This will cause them to be used when building 1095-C form. Only offers in the "accepted" status are used when building the 1095-C form. Offers in the "Rejected" or "Not Accepted" status are ignored.

Reject: Pressing Reject will move selected offers to the "rejected" status. This will cause them to be ignored when building the 1095-C form. If the system automatically added an offer that never happened, you want to reject it, not delete it. If you delete it, the system will recreate it.

Review the employee results. If it's determined that the employee was notified of coverage, simply click the box to the left of their name and select **Accept**. To confirm that the employee was not notified and coverage was not offered, click next to their name and select **Reject**. Offers that are **Not Accepted** or

Rejected report as No Offer, which translates to the IRS as the employee not being offered medical coverage.

Please allow for the overnight calculation process to run in between completion of the above and running the Monitoring report.