

[Version 1.0 - 08.01.2022]



Watch our SyncStream Quick Start Video here

Introduction

This guide is the go-to resource for understanding changes to SET SEG's ACA tracking and reporting (ACATR) process within the new reporting system, SyncStream.

Read on for instructions on how to access SyncStream and locate meaningful reports.

The Basics

- Old Process vs. New Process
- Account Registration
- Basic Navigation
- Viewing Employee Demographics & Data
- View, Filter, and Export SyncStream Reports and Tables

Monthly Report Review Process

This section offers instructions for locating your compliance reports within SyncStream.

How Do I	SET SEG Member Portal	SyncStream
check what payroll data has been uploaded?	Payroll Submission History Report	Payroll Report
monitor districts monthly compliance and ESRP Risk? determine 95%/fine risk/employees causing risk?	Compliance Review (CoRe) Report	Compliance Risk Reports
see who I need to offer coverage to? check current measurement statuses and projected eligibility and/or view employee measurements?	Ongoing & New Employee Measurement Reports	Eligibility & Measurement Reports





Old Process vs. New Process

The introduction of SyncStream modifies the existing ACATR process but does not overhaul it. The diagram below displays the differences between the current and new processes, primarily how ACATR users retrieve their reports. All upload procedures will remain as-is in the SET SEG Member Portal.

SyncStream has resulted in some ACATR methodology changes, which will result in the reports looking and feeling different than you're used to. You can find additional information <u>here</u>.

Data Upload & Retrieval Process







Account Registration

- 1. You will receive an email from customerservice@setseg.org containing your username and temporary password to create an account with SyncStream.
 - Due to the sensitive nature of the data within SyncStream, this email will be encrypted and sent securely using Zix Messaging.
 - If you have not yet created a Zix account, you will be prompted to do so as shown below.
 - If you have an existing Zix account, please log in to access the encrypted email message.

S	ET EG
Register Account	
Enter your email address and	a password to register and begin sending and receiving secure messages.
	Email Address:
	Password:
	(P)
	Re-enter Password:
	Password Rules
	Passwords must be at least 6 characters in length, and meet 2 of the following conditions: • Contain both alphabetic and numeric characters • Contain both uppercase and lowercase characters • Contain at least one special character, such as: ~1@#\$%^& Passwords cannot match email address.
	Cancel Register

- 2. Open a web browser window (Note: Chrome is preferred) and navigate to dashaca.com.
- 3. Log in using the username and temporary password supplied in the encrypted email.

Log On	
Please enter you	ir user name.
User Name	
[
7	
Next	

Account Registration Cont.

- 4. Create a new password.
 - Navigate to the top right corner
 - Select your email address
 - Select Change Password
 - Enter your temporary password in the Old Password field
 - Create a new password using the below requirements

NOTE SyncStream will require you to change your password every 90 days

Change Password		×
 Your password must be a minimum Your password must contain at lea Your password cannot contain rep Your password must contain at lea 	· of 8 characters st one uppercase character st one lowercase character to en unite (0:123456789) st one special character ((過母劣% &*()+=`<>,?/(i)) ating characters (ie. ''ee',"aa",*(1'') an your user name	
Old Password ->>	P	
New Password	P	
Confirm Password ->	P	
ChangePass	word	
	_	
		Close
		Choice

- 5. If you have trouble setting up your account, logging in, or creating a new password, please contact **customerservice@setseg.org**
- 6. View & Verify Account Profile
 - To verify that your account profile information is up-to-date, navigate from the dashboard and click Show/hide.



- It is crucial that your district's account profile is current because this information will be displayed on your 1094-C and 1095-C forms.
- NOTE The email address listed should display as customerservice@setseg.org. If any information shown is incorrect, please contact customerservice@setseg.org to have it updated.





Watch the **Payroll** section of our **SyncStream Quick Start Video** here

Payroll Report

Report Purpose: Displays payroll data at employee level by pay period

Finding, Viewing, And Exporting The Report

1. From the dashboard's homepage, select **ACA Tracking Home** under the ACA Tracking tab.



2. Select Run Payroll Report.

• Dates are pre-selected to include all payroll history but can be altered to filter for payroll data in a specific range.

SE	ACA Tracking ACA Reportin	g J Sync EEOC Reporting ACA	Audit Support Admin	
			ACA Tracking	
				Employee Breakdown
	202			
	All Employees	All Tracked Employees	Measured Employees Report	
2	Ľ			Designated Futtime Cropping Hourly Run Payroll Report
	Designated Full Time	Measurement Data Archive		

• Select Send to Excel inside the report window to export a payroll report.

Refi	resh	ecords	Dekte All	Records										
	id Y	End T Date	Name 🔻	Department	¥ Locatio	n 🔻 Hired 👌	Orig Y Hired	Termed Y	Status ¥	Туре 🔻	Рау Т Туре	Hourty ¥ Rate	Hours Worked	Ŧ
				-								-		
										Ξ.				
												**		
										τ.		-		

- NOTE The Starting Date Worked and Ending Date Worked columns will display information once Send to Excel is selected. To view in the table, use the filter next to End Date.
- 3. Generating Report
 - It may take several minutes for the report to generate.
 - Select **Send to Excel** to navigate away from this page (Note: Closing the window will not end the export).
 - Once the report is ready for download, you will receive an email notification as well as an alert in My Alerts on the Dashboard.



CET								📼 🏄	iupdike@setseg.org 🔻
							You have 1 notifications	Mark all as read Delete All	
							🔀 Aster Bernsterer Bernster	about a minute ago	
ACA Tracking	ACA Reporting	ISync	EEOC Reporting	ACA Audit	Support	Admin	2	about an hour ago	

- 4. Download Report
 - Click the SET SEG logo to navigate back to the dashboard homepage.
 - Under My Alerts, select the title of the notification and download the payroll report using the link that appears in the pop-up window.

EG ACATROORS ACATROOMS (Spic FFOCTOPONES) ACAAust Suppon Ast	n	iting	Start Time: From: Sync Message	5/4/2022 8:39:46 AM Stream Admin			
Knowledge Base to knowledge Sam and all of an one of a regeneration and and an one of a regeneration and and an one of a regeneration and an one of a sam to an and an or a sam and an of a sam Sam and an or a sam and an of a sam Sam and an of a sam and a sam and a sam Sam and a sam and a sam and a sam Sam and a sam and a sam and a sam Sam and a sam and a sam and a sam and a sam Sam and a sam and a sam and a sam and a sam Sam and a sam and a sam and a sam and a sam Sam and a sam and a sam and a sam and a sam Sam and a sam and a sam and a sam and a sam and a sam Sam and a sam and a sam and a sam and a sam and a sam Sam and a sam and a sam and a sam and a sam and a sam Sam and a sam and a sam Sam and a sam and a sam Sam and a sam and a sam and a sam a	account Production	The Lear step t	Report Type Payroll Report	Company Name	Request Date 5/4/2022 8:39:45 AM	Plan Start Date(Plan Statistics Report) 1/1/1900	Plan End Date(Plan Statistics Report) 12/31/2199
My Messages Mark all as read Deleter All wells Bart hall There are no literes to dispany	My Alerts Mark all as read Delete All edit. Start take 6542022 Korg Taxe: Elect Triorett	resources su	Click he	re o download f	ile ill no longer be ava	ilable to download after 48 l	hours.

Summarizing Data by Pay Period

- I. Open the Excel Payroll Report File
 - This report provides payroll data for each employee for each pay period.
 - Historical demographic information is included as well, such as status and type effective to a corresponding pay period. The following steps demonstrate how to create a summary table of hours by pay period used for reconciliation.

SyncStream reports offer additional data that SET SEG's previous reports did not. See the Excel steps below for the tools to effectively analyze your reports.

Clipboard	5 1	Font G	Al	gnment	5	Number	5			Styles			Cells		Editing	Analysis
E10 * !	X V fe															
a A	В	с	D	E	F	G	н	J	К	L	м	N	0	P	Q	R
Company Name	Employee ID	Employee Name	Employee First N	Employee N	Employee Last	Date Hired	Date 1 Employee Status	Employee Type	Pay Type	Residence State	Employment State	Department	Location	Rate of Pay	Hours	Work Ending Date
22 Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full Time	Hourly	MI	MI	Associate Pro	fessor	19.4	2 62.9	2 10/15/2018
ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.4	5 83.0	1 10/31/2018
ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.3	6 100.2	6 11/15/2018
5 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.9	4 74.	5 11/30/2018
5 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	19.1	8 67.9	1 12/15/2018
7 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	19.4	7 123.7	8 12/31/2018
ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	19.7	9 74.0	9 1/15/2019
2Z Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.4	9 9	3 1/31/2019
0 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.8	2 7	0 2/15/2019
1 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	19.0	8 83.1	7 2/28/2019
2 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.5	8 98.0	1 3/15/2019
3 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	21.5	3 52.1	7 3/31/2019
4 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.9	5 85.4	1 4/15/2019
5 ZZ Demo - Grant-P	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.4	1 109.8	3 4/30/2019
6 ZZ Demo - Grant-I	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	18.6	8 106.2	5 5/15/2019
7 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	19.4	4 100.5	8 5/31/2019
8 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	21.0	4 46.6	8 6/15/2019
9 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	16.7	7 47.8	4 6/30/2019
0 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	16.4	6 38.5	9 7/15/2019
1 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	16.6	9 23.1	6 7/31/2019
2 ZZ Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	16.	5 48.5	8 8/30/2019
3 22 Demo - Grant-F	105456513	Leann Waterland				08/25/2014	Active	Full time	Hourly	MI	MI	Associate Pro	fessor	20.2	7 53.5	1 9/13/2019

2. Convert To Date Format

• Select Column **R** (Work Ending Date).

¥			lorma	12	Norr	mal	Bad		Goo
8	Conditional F Formatting ~	Format as Nable ~	leutra	I	alc	ulation	Check	Cell	Exp
rs,						Styles			
				-					
	0	Р		Q	-	R		s	
oca	tion	Rate of Pa	ay H	ours		Work Endin	g Date	Miscella	neou
		46	5.84	60	.33	01/26/2020			
		46	5.84	60	.33	02/09/2020			
		46	5.84	60	.33	02/23/2020			
		4	10.6	59	.33	03/08/2020			
		46	5.84	59	.83	03/22/2020			
		46	5.84	60	.33	04/05/2020			
		46	5.84	60	.33	04/19/2020			
		46	5.84	60	.33	05/03/2020			
		46	5.84	60	.33	05/17/2020			
		46	5.84	100	.33	05/31/2020			
		46	5.84	60	.33	06/14/2020			
		46	5.84	60	.33	06/28/2020			
		46	5.84	60	.33	07/09/2020			
		46	5.84	60	.33	07/26/2020			
		46	5.84	60	.33	08/09/2020			
		49	9.43	60	.33	08/23/2020			
		49	9.43	60	.33	09/06/2020			
		49	9.43	60	.33	09/20/2020			
		49	9.43	60	.33	10/04/2020			
		49	9.43	60	.33	10/18/2020			
		49	9.43	60	.33	11/01/2020			
		49	9.43	60	.33	11/15/2020			
		49	42	59	22	11/29/2020			_

3. Convert Text To Columns

• Within the Data tab, select **Text to Columns**

Autosave 🕑 Of	ッロ フェー・		Payrolikeport-20220304101	- 2001		>> Search (Alt+Q)				
File Home	Insert Page Layout	Formulas Data	Review View H	elp						
Get From Data ~ Text/CSV	From From Table/ Recent Exi Web Range Sources Co	ections All ~	Queries & Connections Properties Edit Links	Stocks Geograph	y ⊽ X↓ S	ort Filter	iy Text to	Flash Remov	re Data Consol tes Validation ~	idate Relationships
	Get & Transform Data 🛛 🕇 🥌	Quer	ries & Connections	Data Types		Sort & Filter			Data Tools	
R1 *	: × ✓ ƒx Work	Ending Date					45			
G	H I	L	K L	м	N	2 。	р	Q	R	S T
1 Date Hired	Date Tern Employee Status	Employee Type P	ay Type Residence State	Employment State	Department	Location	Rate of Pay	Hours	Work Ending Date	Miscellaneous
2 10/12/2009	Active	Full Time H	lourly		TEACHERS		46.84	60.33	01/26/2020	
3 10/12/2009	Active	Full Time H	lourly		TEACHERS		46.84	60.33	02/09/2020	
4 10/12/2009	Active	Full Time H	lourly		TEACHERS		46.84	60.33	02/23/2020	
5 10/12/2009	Active	Full Time H	lourly		TEACHERS		40.6	59.33	03/08/2020	

• Select **Next** (the delimited option should be pre-selected)



• Make sure all delimiters are unselected in the top left, select **Next**

Convert Text to Colur	nns Wizard - Step 2 of 3			?	×
This screen lets you set t Delimiters Dab Semicolon Comma Space Qther:	he delimiters your data contains. Y	tou can see how you 1 as one	r text is affected in the j	preview	below.
Data preview Fork Ending Date 01/26/2020 02/09/2020 03/08/2020 03/22/2020 03/22/2020 04/05/2020 <	,	2			^ ~ >
	Cancel	< <u>B</u> ack	Next >	Eini	sh

Select Date under column data format and select Finish

Convert Text to Columns Wizard	Step 3 of 3		7	×
This screen lets you select each column Column data format General I Ext Date: MDY Do not import column (skip)	'General' converts nur remaining values to te	at. D neric values to numb xt. <u>A</u> dvancec	ers, date values to date	es, and all
Destination: \$R\$1				1
Data preview HUV Work Ending Date 0.1/24/2020 02/39/2020 02/39/2020 03/22/2020 03/22/2020 M/OS/2020 <			2	^ ~ ~
	Cancel	< <u>B</u> ack	Next >	Einish

Create A Pivot Table

I. Create a pivot table to see total hours by pay period. Under the Insert Toolbar, select Pivot Table

File	Home	Insert Page Layout	Formulas Data	Review View	Help					
Pivot Kole	Recommen PivotTable Tables	ded Table Pictures Shi	illustrations	SmartArt	Get Add-ins	Recommended Charts		PivotChart ~ Is	3D Line Col Map ~ Spar	umn Win/ Slic
A1	•	× √ f _x W	ork Ending Date							
1	A	В	с	D	E	F	G	н	1	L J
1 Comp 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 22 22 22	<u>2</u>	Employee ID	Employee Name	Employee First Na	m Employee Midi	3	st Name Date Hired 10/12/2009 10/12/200	Date Terr Date T	r Employee Status Active Activ	Employee Type Full Time Full Time
23 24						-	10/12/2009		Active	Full Time

- 2. Using the drag-and-drop pivot table task pane, drag **Work Ending Date** into the Rows box, drag **Hours** into the Values box, and drag **Employee Status** into the Filters box
 - Years and Quarters will autopopulate in the Rows box
 - The Hours variable should automatically be converted to Sum of Hours
- 3. Select a value in the left column of the pivot table (one of the years or dates) and select **Ungroup** to show hours by individual pay periods.



AutoSave (•••• 🗄 り・ペ・ -	PayrollReport-20220504T0	71952 - 🔎 Sea	rch (Alt+Q)		Isaac Updike 🛞	b – 0
File Ho	ome Insert Page Lay	out Formulas Data	Review View Help	PivotTable Analyze	Design		모 Comments 🛛 🖻
Paste 🗳	$\begin{array}{c c} \hline Calibri & 11 \\ \hline B & I & \underline{\cup} & \underline{\vee} & \underline{\square} & \underline{\vee} & \underline{\vee} \\ \end{array}$		ab Wrap Text Ξ ₩ Merge & Center ~	General ✓ \$ ~ % 9 500 300	Conditional Format as Cell Formatting ~ Table ~ Styles ~	Insert	Find & Analyze Select * Data
Clipboard	Font Font	Ali	gnment F	Number 🛛	Styles	Cells Editing	Analysis
A5 A 1 2	Calibri $\sim 11 \rightarrow A^{*} A^{*} $ B $I \equiv \Delta \sim A \sim \square $	~ % 9 ⊡ . ‰ . ∰ ≪ E	F G H	I J	K L M	PivotTable Fields	÷
3 Row Lat 4 ⊕ 2020 5 ⊕ 2021	Eormat Cells	left column				Search	
6 8 9 10 10 10	Sort > Filter >					Employee Last Name Date Hired Date Terminated Fmployee Status	
11 12 13 14	Subtotal "Years" Expand/Collapse > Group		Select Ingroup			Drag fields between areas below T Filters	: III Columns
15	الله Ungroup						
18 19	Move 7 × Remo⊻e "Years"					Rows Years Years	∑ Values Sum of Hours
20 21	Field Settings PivotTable Options				v	Quarters 💌 💌	
Ready	Hide Fiel <u>d</u> List		: (। ज्रू Displ	y Settings III III	

Summary Pivot Table

- The pivot table should now look similar to the table shown in the screenshot below.
- The pay period end dates are on the left, and the total hours recorded for all employees are on the right, sorted by date.
- Sum of Hours is useful for reconciliation with payroll systems to ensure all records were submitted with the payroll file, while the pay period end dates are useful for ensuring all pay periods have been uploaded.

,	AutoSave 🛄 🕅		*~ ₹			Payrol	Report-20220	1504107195	2 *
F	ile Home	Insert Pa	ige Layout	Formul	as Dat	a Revie	w View	Help	Pivo
[Cut	Calibr	i	~ 11 ~	A^ A	ΞΞ	- % ·	ab C Wrap	Text
P	aste → ≪ Format P	Bainter	<u>u</u> ~ [<u> </u>	~ <u>A</u> ~	≣ ≣ ₹	€= →=	😫 Merge	e & Cent
	Clipboard	5	Fo	nt	۲ <u>م</u>		Alignr	nent	
A	3 *	: × 🗸	f _x R	ow Labels					
	А	В	с	D	E	F	G	н	1
1									
2									
3	Row Labels 💌	Sum of Hours							
4	1/26/2020	4255.93							
5	2/9/2020	4387.02							
6	2/23/2020	4356.26							
/	3/8/2020	4361.27							
8	3/22/2020	4647.99							
9	4/5/2020	4298.76							
10	4/19/2020	3880.27							
11	5/3/2020	4294.70							
12	5/1//2020	4309.70				N			
13	5/31/2020	2965 97				h	3		
14	6/14/2020	3803.87							
15	7/9/2020	2505.44							
17	7/26/2020	4015.92							
18	8/9/2020	3547 54							
10	8/23/2020	3905 24							
20	9/6/2020	4165.53							
21	9/20/2020	4259.27							
22	10/4/2020	4254.24							
23	10/18/2020	4352.71							
24	11/1/2020	4135.96							
25	11/15/2020	4181.47							
26	11/29/2020	4090.22							
27	12/13/2020	4332.02							
28	12/27/2020	3985.02							
29	1/10/2021	3960.28							





Watch the **Compliance** section of our **SyncStream Quick Start Video** here

Compliance Risk Reports

Report Purpose: Display and analyze ACA compliance risk of facing Employer Shared Responsibility Provisions (ESRP) fines.

This section will demonstrate how to access ACA compliance and potential fine risk information through two SyncStream Reports.

- The first report focuses on the 95% offer requirement
- The second report focuses on the potential fines for individual employees who may have received a marketplace subsidy as well as identifying those specific employees
- · Both reports identify which employees are causing the compliance risk

"A" Penalty Risk Check

1. From the dashboard homepage, select Reporting Home under the ACA Reporting tab.



2. Select Compliance Risk Reports



- 3. View the A Penalty Risk Check table.
 - Verify that the Percentage Offered is greater than 95% and is accurate for the corresponding month and year.
 - The right-most column, # of employees with compliance risk, shows how many employees present a potential compliance risk because they are eligible for coverage but not documented as being offered Minimum Essential Coverage.

	D	SET SEG	ACA Tracking ACA Reporting E	EOC Reporting ACA Audit Support Admin			1 Select Report	Lipdike@peticep Image: Second Seco	.org 🕶
res .				Compliance	Risk Reports				
				ZZ Demo - Grant-Pro	esley Public Schools				
Month	Year	Number Of Elig	ible Imployees	A Penalty F	Risk Check	Penality A Risk	If of employees with Compli	Expr	at Report
January	2022	404		404	100.00 %	0	0		
February	2022	406		406	100.00 %	0	0		
March	2022	408	3	408	100.00 %	0	0		
April	2022	408	3	408	100.00 %	0	0		
				B Penalty F	Risk Check			Ехро	ort Report
Month		Year	FT Eligible Employees not offered		FT Eligible Employees unaffordable			B Penalty Risk	
January		2022	0		0			0	
February		2022	0		0			0	
March		2022	0		0			0	

Helpful report features:

- Select tax reporting year
- Export to Excel file
- Employee category totals linked to detailed tables

◇ NOTE When viewing the compliance reports in SyncStream, the user can drill down by clicking the number under Number of Eligible Employees, which will display a table of eligible full-time employees in the corresponding month.

	A Penalty Risk - FT E	lig	ible Employees				×
k	January - 2022					Export Rep	ort
	Employee Id	٣	Employee Name	Hire Date	٣	ACA Status	٣
	103049892		Jeno Downes	09/08/2015		Designated Full-Time	
	105456513		Leann Waterland	08/25/2014		Designated Full-Time	
	106430477		Karlens Damody	10/13/2014		Designated Full-Time	
	109494138		Koralle Kosiada	08/22/2016		Designated Full-Time	
	110435113		Pepe Barttrum	08/13/2018		Designated Full-Time	
	111996932		Katey Murfin	01/03/2011		Designated Full-Time	
	********		P	****		Personal di Personali di	•
						C	KU546

4. Generate a table of specific employees who present a potential compliance risk for a particular month by clicking a number under the # of employees with Compliance Risk column.

"A" Penalty Risk Check										
Month	Year	Number Of Eligible Employees	Number Offered at least MEC	Percentage offered	Penalty A Risk	# of employees with Compliance Risk				
January	2022	239	199	83.00 %	47896.53	40				
February	2022	240	200	83.00 %	48125.7	40				
March	2022	240	200	83.00 %	48125.7	40				
April	2022	241	201	83.00 %	48354.87	40				
May	2022	241	201	83.00 %	48354.87	40				

Summary Pivot Table

I. Scroll down from the "A" Penalty Risk Check to view the "B" Penalty Risk Check

NOTE The "B" Penalty Risk Check has the same tax year selection, export, and detailed employee table functionalities as the "A" Penalty Risk Check.

2. Select a number under the FT Eligible Employees not offered column to view which specific employees present a potential compliance risk for a particular month.

			"B" Penalty Risk Check	Export Report
Month	Year	FT Eligible Employees No offer Or MEC Only offer	FT Eligible Employees unaffordable	B Penalty Risk
January	2022	40	0	13733.2
February	2022	40	0	13733.2
March	2022	40	0	13733.2
April	2022	40	0	13733.2
May	2022	40	0	13733.2

3. Verify the Full Time Eligible Employees not offered table that appears is accurate for the corresponding month and year.

The FT Eligible Employees unaffordable column shows how many employees present a potential compliance risk because they were offered coverage that isn't affordable based on their rate of pay.

ONOTE To accurately assess compliance risk, ensure that all data is up to date.

♥ NOTE Sometimes, identifying compliance risks can help find errors or missing data. For example: If a full-time employee is incorrectly documented as not being offered minimum essential coverage, it's likely they have not yet been assigned a plan. If you are confused by compliance risks shown in your dashboard or unsure of what to do about them, please contact SET SEG for support.





Watch the Eligibility section of our SyncStream Quick Start Video here

Eligibility & Measurement Reports

Measured Eligibility Report

Report Purpose: Identifies the part-time/variable-hour employees that need to be offered coverage.

1. From the dashboard homepage, select ACA Tracking Home under the ACA Tracking tab



2. Select Measured Employee Report



3. Users can view and filter results using SyncStream's data table functionality. Click <u>here</u> for instructions on filtering data tables.

U			ng EEOC Reporting ACA Audit	Support Admin						≥ ⁰	<mark>,≜⁰ ispaike</mark>	ĝsetseg.org ▼
e Print d	Send To Excel	Current ACA Status	asured Employees R	Measurement	Demo - Gra	Admin	ey Public :	Schools	Avg Weekly Y	Date of Hire ¥	Total Hours	Total Weeks
	Name		Period Start Date 1	Period End Date	Period Start Date	Period End Date	Period Start Date	Period End Date	Hours		Worked in MP	Worked in MP
137375188	Kala Hornung	Calculated Non-Full-Time	07/01/2020	05/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	0.27	07/01/2015	14.00	52
143862086	Suzi Aldie	Calculated Full-Time	07/01/2020	05/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	31.52	01/04/2012	1638.99	52
163119324	Kalle Clutton	Calculated Non-Full-Time	07/01/2020	05/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	4.72	10/15/2018	245.33	52
191421928	ingar Danahar	Calculated Non-Full-Time	07/01/2020	05/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	19.93	10/15/2018	956.75	48
213205857	Myranda Rossi	Calculated Non-Full-Time	07/01/2020	05/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	28.49	10/15/2018	1424.60	50
238640034	Tatiana Hrinchishin	Calculated Non-Full-Time	01/13/2021	01/12/2022	01/13/2022	02/11/2022	02/12/2022	02/11/2023	11.02	01/13/2021	341.50	31
251728367	Obadiah Dabrowski	Calculated Non-Full-Time	07/01/2020	06/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	0.00	10/03/2011	0.00	52
268104445	Kelvin Meeland	Calculated Non-Full-Time	07/01/2020	05/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	25.13	04/29/2013	1305.93	52
274456566	Jacobo Petit	Calculated Full-Time	07/01/2020	05/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	31.41	10/01/2008	1633.23	52
287346639	Markos Ironmonger	Calculated Full-Time	08/13/2020	08/12/2021	08/13/2021	09/11/2021	09/12/2021	09/11/2022	40.00	08/13/2020	2080.08	52
Showing items 1	through 10 of 41					s	how more				Page	Size - 10
Aowered by SET SEG												

♥ NOTE Filter Current ACA Status for Calculated Full-Time to see employees who have measured eligible and are entitled to an affordable offer of coverage starting on their Stability Period Start Date.

Designated Full Time Report

Report Purpose: Identifies the designated full-time employees that are required to be offered coverage.

- 1. From the dashboard homepage, select ACA Tracking Home under the ACA Tracking tab
- 2. Select Designated Full Time

	Support Admin	tupakkestpebes.og ▼
	ACA Tracking	ZZ Demo - Grant-Presky P.,. * Q
		Employee Breakdown
	Meetines Empiries Beport	
Designed full Time Measurement Eats Arrhue		● Bedgealed Fulltree ● Oncolog Setary
Full Time Equivalent Employees Somultate Average FTE: 299 YEar: 2022 V		Accourt Profile Ltoshvae Companyld: 18054 Employer Name; ZZ Demo - Grant-Presiley Public

The table shows all employees designated full time in the employee file.

	G ACATTRACKING	ACA Reporting EEOX	C Reporting ACA Audi	: Support Admin				. ₹0	kipdike@setseg.org 🔻
Print Send To Excel		Designated	Full-Time En	nployees - ZZ [Demo - Grant	-Presley Public Scl	hools	ŧ	
Employee Department	Employment State	Y Residence State	Employeeld	Employee Name	 Employment Typ 	e Y Current Status	Employment Date	Average Weekly Hours	In Waiting Period Y
Associate Professor	MI	MI	105456513	Leann Waterland	Hourly	Designated Full-Time	8/25/2014	37.61	No
Financial Advisor	MI	MI	109494138	Koralle Kosiada	Hourly	Designated Full-Time	8/22/2016	28.08	No
Human Resources Manager	MI	MI	110435113	Pepe Barttrum	Salary	Designated Full-Time	8/13/2018	40.00	No
Electrical Engineer	MI	MI	118070218	Biddy Dennidge	Salary	Designated Full-Time	8/28/2008	40.00	No
Pharmacist	MI	MI	125478595	Geordie Eschalotte	Hourly	Designated Full-Time	7/31/2019	0.00	No
Editor	MI	MI	128316355	Brandyn Orgill	Hourly	Designated Full-Time	8/30/2010	24.35	No
GIS Technical Architect	MI	MI	129717874	Sisely Malthouse	Salary	Designated Full-Time	8/18/2003	40.00	No
Social Worker	MI	MI	130662363	Damara Sotheby	Hourly	Designated Full-Time	7/10/2017	21.37	No
Physical Therapy Assistant	MI	MI	131535801	Kandace Dowdle	Salary	Designated Full-Time	8/31/2009	40.00	No
Graphic Designer	м	MI	131649205	Langston Bellini	Salary	Designated Full-Time	5/13/2014	0.00	No
	Showing items 1 through	10 of 292				Show more			Page Size - 10 V

NOTE Filtering the employment date (i.e., an employee's date of hire) column is useful for identifying new full-time hires who need an offer of coverage.

NOTE The Average Weekly Hours column can be used to identify employees designated full time who aren't measuring over 30 hours per week.

All Tracked Employees Report

Report Purpose: Display employee demographic and status information to be able to audit

- 1. From the dashboard homepage, select ACA Tracking Home under the ACA Tracking tab
- 2. Select All Tracked Employees



This table displays the measurement period currently in progress and is used to track employees during that specific period.

				All Tra	cked Employe	es - Demo - S	SS Sales				
🔒 Print 🖉 Se	nd To Excel										
Employment State ¥	Residence State Ŧ	Employee Name	▼ Employment Type ▼	Tracked Projected Status	▼ Employment Date	 Average Weekly T Hours 	Maximum T Average Weekly Hours to Maintain Non-Full-Time Status	Measurement Type	▼ Measurement Start ▼ Date	Measurement End T Date	Current Period
CA	CA	Clayborn O'Logan	Hourly	Calculated Full-Time	6/15/2019	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Mitch Stokoe	Hourly	Calculated Non-Full-Time	10/15/2019	25.30	48.19	New Variable Hour	11/1/2019	9/30/2020	Measurement Period
CA	CA	Damien Karras	Hourty	Calculated Full-Time	9/30/2007	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Sue Worswick	Hourly	Calculated Full-Time	6/15/2014	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Juliette Maggorini	Hourly	Calculated Full-Time	11/14/2013	31.00	28.72	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	СА	Sax Westley	Hourly	Calculated Non-Full-Time	4/5/2013	11.50	31.47	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Annie Wilkes	Hourly	Calculated Full-Time	4/27/2014	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Pepe Drever	Hourly	Calculated Non-Full-Time	11/6/2016	14.50	31.05	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Amory Waltho	Hourly	Calculated Full-Time	9/3/2016	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	David Kessler	Hourly	Calculated Full-Time	11/10/1999	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
		Showing items 1 throu	igh 10 of 51					Show more			Page Size -= 10

◇ NOTE Once a measurement period is completed, any employee that has been calculated full time will be moved to the Measured Employee Report, which can be found on the ACA Tracking Home page. The All Tracked Employees Report offers the following information:

- Employment Date Employee date of hire
- Average Weekly Hours The average number of hours that an employee has worked weekly up to the current week of payroll in SyncStream.
- Maximum Average Weekly Hours to Maintain Non-Full-Time Status If an employee's hours are lowered to an average below what is displayed in this column, the employee will calculate as Non-Full-Time under ACA Regulations. This can be used by scheduling and HR departments to keep part-time personnel under the threshold of being insurance eligible.
- **Measurement Type** Displays the type of measurement period for each employee (either Ongoing Hourly or New Variable Hour).
- **Current Period** Displays either Measurement Period or Administrative Period.

♥ NOTE If the employee is in an Administrative Period and lists Calculated Full-Time under the Tracked Projected Status column, it is time to offer insurance.





Viewing Employee Demographics & Detail

SyncStream's increased functionality offers school district users the ability to view current and historical data submitted for each employee. The following steps demonstrate how to view and audit employee demographic information in SyncStream.

- 1. Select ACA Tracking Home under the ACA Tracking tab
- 2. Select All Employees



The All Employees Report will display a table of all employees who were active within the past 18 months along with demographic and employment information, such as: FT or PT status, current address, Social Security Number (SSN), hire date, date of birth, and more.

1			8	3				А	ll Emplo	oyees						Z	! Demo - Grant	I-Presley P	۲ ۹
Update Basic Into from Pa Create New Employee	yrol Data Export Bat 2 "N mc	lole: The tabl	ie displays t	terminated an	d inactive em	ployees that	It have a term	ination date	within that pa	st 18 months	. In order to see	all employees,		e terminated	The Learnin step theo resources an such	nowledge g center can guide yn nigh the process. Add e wulable to further as videos and webins Growledge Base	e Base u step by idonal assist you, es. Dependents	5 Show all	Empkoyees
Remove	Employee ¥ Empl Id Name	loyee 🔻 I e I	First ¥ Name	Middle T Name	Last T Name	SSN	Hire T Date	Term ▼ Date	Status 🔻	Туре 🔻	PayType 🔻	Address 🔻	City 🔻	State ¥	Department 🔻	Location ¥	Date Of ¥ Birth	Email 🔻	Primary Worksite ZipCode
Edt	102887840 Willet Bangi	tte V iard	Willette		Bangiard	102-88- 7840	10/16/2017		Active	Part time	Hourly	59 Manitowish Drive	Detroit	МІ	Registered Nurse		03/02/1970		
Edt	103049892 Jeno	Downes .	Jeno		Downes	103-04- 9892	09/08/2015		Active	Full time	Salary	3649 Lotheville Road	Farmington	МІ	Internal Auditor		07/17/1955		
Edit	105456513 Lean Water	n l rland	Leann		Waterland	105-45- 6513	08/25/2014		Active	Full time	Hourly	967 Coleman Lane	Muskegon	МІ	Associate Professor		07/06/1990		
Edit	106430477 Karler Darne	ns i ody	Karlens		Darnody	106-43- 0477	10/13/2014		Active	Full time	Salary	6 Lotheville Road	Midland	MI	Web Designer I		12/15/1964		

- 2. Select All Employees Cont.
 - Select **Update Basic Info** from Payroll Data to update/replace data shown in the Employee File with data from the Payroll File (specifically hire dates, termination dates, and status).
 - Select Export Basic Template to download the table to Excel.
 - Select **List Dependents** to display employee dependents for groups with employees enrolled in a self-insured medical plan.
 - Select Show All Employees to display all employees.
 - **ONOTE** This includes employees terminated more than 18 months ago.





View, Filter, Export, and Analyze Data

SyncStream reports can be viewed within the system or exported to Excel. This section will demonstrate some basic functionality shared across many of SyncStream's reports, using the All Tracked Employees Report as an example.

	SEG	ACA Tracking	ACA Reporting	EEOC Reporting	ACA Audit S	upport Admin								
🖨 Print 🖉 Send To E	xcel	1	A	ll Tracked E	mployees	s - ZZ Demo - (Grant-Pres	sley Pu	blic Sch	ools				
Employee Department	Employment ¥ State	Residence ¥ State	Employeeld ¥	Employee Name ¥	Employment ¥ Type	Tracked Projected T Status	Employment ¥ Date	Average ¥ Weekly Hours	Maximum ¥ Average Weekly Hours to Maintain Non-Full- Time Status	Measurement Type	Measurement ¥ Start Date	Measurement ¥ End Date	Current Period T	To Ho Pai
Assistant Professor	мі	MI	108535435	Nathalie Davenhill	Hourly	Calculated Non-Full-Time	1/9/2015	0.00	9.85	Ongoing Hourty	7/1/2021	6/30/2022	Measurement Period	1 0.0
Account Coordinator	м	MI	108960613	King Lapwood	Hourly	Calculated Non-Full-Time	3/5/2019	0.00	11.20	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	J 0.0
Help Desk Technician	MI	м	109651837	Nan Simester	Hourly	Calculated Non-Full-Time	12/31/2018	0.00	12.75	Ongoing Hourty	7/1/2021	6/30/2022	Measurement Period	J 0.0
Assistant Professor	МІ	MI	132159838	Leesa Petrasch	Hourly	Calculated Non-Full-Time	7/9/2018	0.00	8.33	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	J 0.0
Internal Auditor	MI	MI	137375188	Kala Hornung	Hourly	Calculated Non-Full-Time	7/1/2015	0.27	57.89	Ongoing Hourty	7/1/2021	6/30/2022	Measurement Period	1 7.0
Technical Writer	MI	MI	143862086	Suzi Aldie	Salary	Calculated Full-Time	1/4/2012	32.12	25.87	Ongoing Salary	7/1/2021	6/30/2022	Measurement Period	1 836
Biostatistician III	MI	м	151915055	Danice Verlander	Hourly	Calculated Non-Full-Time	11/7/2017	0.00	9.63	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	J 0.0
Structural Analysis Engineer	MI	MI	163119324	Kalle Clutton	Hourly	Calculated Non-Full-Time	10/15/2018	6.71	51.41	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	J 174
Nurse Practicioner	MI	м	169628186	Celestia Lowle	Hourly	Calculated Non-Full-Time	2/25/2019	0.00	9.27	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	J 0.0
GIS Technical Architect	MI	MI	186077779	Suzanne Phipp	Salary	Calculated Non-Full-Time	8/12/2021	15.50	37.48	New Variable Hour	8/12/2021	8/11/2022	Measurement Period	J 310
	Showing	; items 1 throug	h 10 of 107					-	Show more				Page Size - 10	۷
Results Powered By SET				4	_						4	3		,

I. Send to Excel

- This will download the table as an Excel spreadsheet
- On other report pages, this option can appear as Export Basic Template

2. Filter Function

- This function allows you to filter the table to show certain rows. Select the filter icon to begin.
- For undefined text data fields, such as Employee Name, any text can be typed into the filter value box to search for a name. The Type drop-down menu indicates filter logic and includes options for Contains, Equals, StartsWith, and EndsWith.

2. Filter Function Cont.

*Note: more t	The table displa han 18 months a	ys terminated ar ago, click the "Sh	nd inactive em now All Employ	ployees th yees" butto	at have a termi n.	ination date	e within tha	it pa
Employe Name	e ▼ First	T Middle T	Last T ne	SSN	Hire ▼ Date	Term ▼ Date	Status	₹
Willette Bangiard	Value:		giard		10/16/2017 search the fe	quer t box	Active	
Jeno Dov	Apply		vnes	103-04- 9892	09/08/2015		Active	
Leann	Leann		Waterland	105-45-	08/25/2014		Active	

- For numeric data fields or dates, the filters include logic to filter for values Equals, Greater than, and Less than
- For date values, select Greater than to filter for values after the date entered, and Less than for values before the entered date.
- For pre-defined data fields, such as status, a drop-down box will appear with filter option.
- 3. Use the Page Size drop-down menu to show more or less records at once
- 4. Select Show more to quickly populate the page with additional records
- **NOTE** Refresh the page to reset filters