

QUICK START USER GUIDE ACA TRACKING AND REPORTING SOLUTION



[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 [here](#).

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.

The screenshot shows a web form titled "Register Account" with the SET SEG logo at the top left. Below the logo, the text reads "Register Account" and "Enter your email address and a password to register and begin sending and receiving secure messages." The form contains three input fields: "Email Address:", "Password:", and "Re-enter Password:", each with a small eye icon to the right. Below these fields is a section titled "Password Rules" which states: "Passwords must be at least 6 characters in length, and meet 2 of the following conditions:" followed by a bulleted list: "Contain both alphabetic and numeric characters", "Contain both uppercase and lowercase characters", and "Contain at least one special character, such as: ~!@#\$\$%^&". Below the rules, it says "Passwords cannot match email address." At the bottom right of the form are two buttons: "Cancel" and "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.

The screenshot shows a web form titled "Log On" with the text "Please enter your user name." Below this is a label "User Name" and a text input field. At the bottom left of the form is a blue button labeled "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 of 8 characters
- Your password must contain at least one uppercase character
- Your password must contain at least one lowercase character
- Your password must contain at least one number (0123456789)
- Your password must contain at least one special character (!@#%&'()*+,-./:;<>?|~)
- Your password cannot contain repeating characters (ie. "ee", "aa", "11")
- Your password must be different than your user name

Old Password →


New Password →

Confirm Password →

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**.

 Account Profile

[Show/hide](#)

Companyid: 18604
Employer Name: ZZ Demo - Grant-Presley Public Schools
Legal Name: N/A
EIN: 338977420
Address: 672 4th Park
City: Detroit
State: MI
Zip: 48206
Contact Number: 313-560-8470
Primary Contact: Sally Field
Control Group Parent: N/A
Email Address: customerservice@setseg.org
Branding: SET SEG
Product: ACA Tracking and Reporting
Measurement Email Notification: No

- 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.

QUICK START USER GUIDE ACA TRACKING AND REPORTING SOLUTION



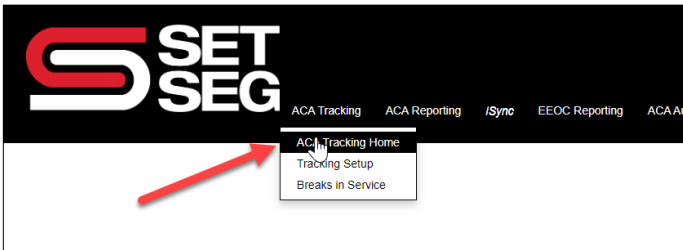
Watch the **Payroll** section of our
SyncStream Quick Start Video here

Payroll Report

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

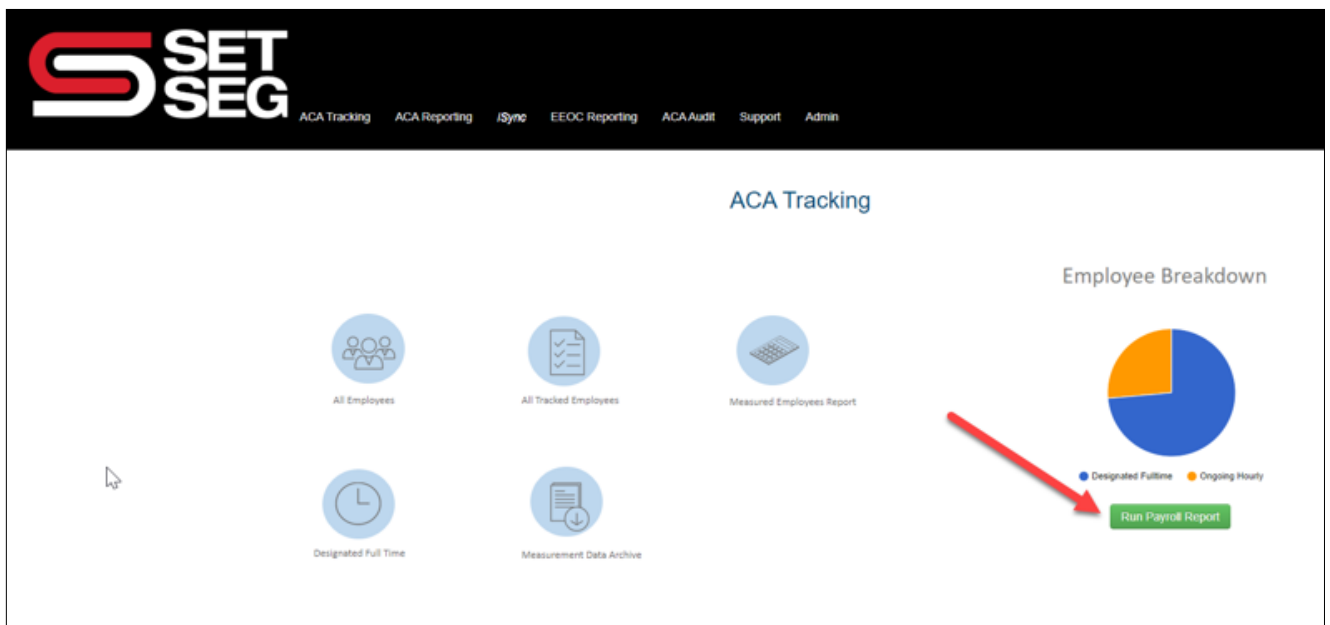
Finding, Viewing, And Exporting The Report

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

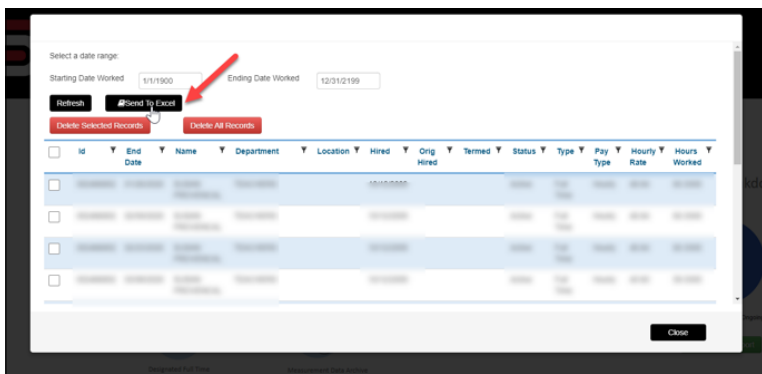


2. Select **Run Payroll Report**.

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



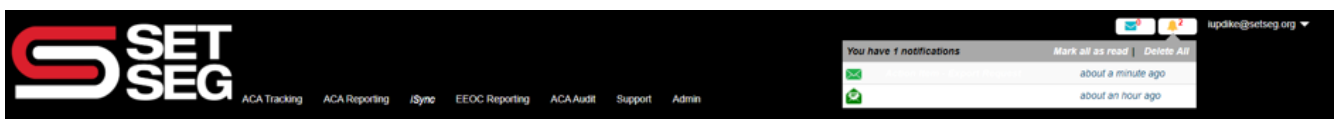
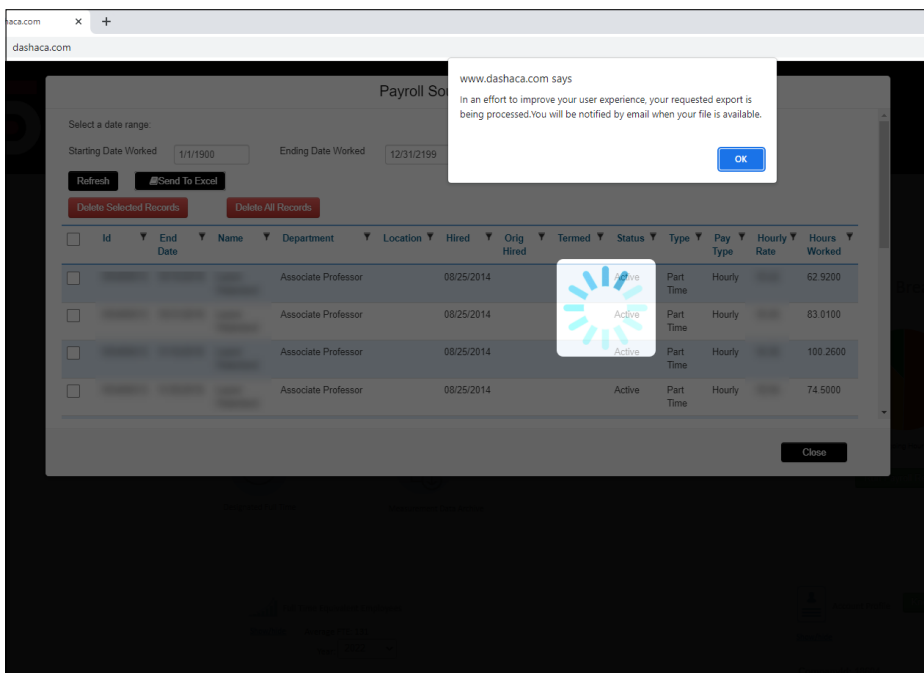
- Select Send to Excel inside the report window to export a payroll report.



✔ **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.

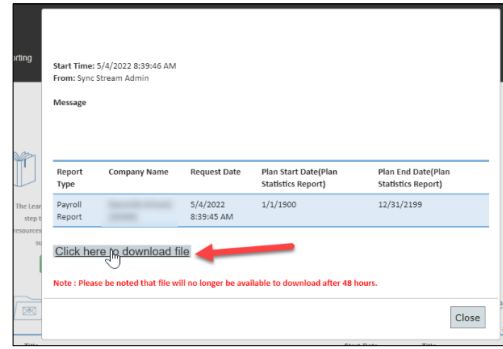
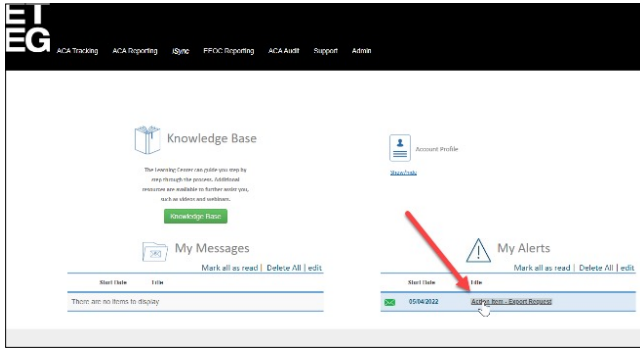
3. Generating Report

- 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.



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.



Summarizing Data by Pay Period

1. 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.

✔ **NOTE** 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.

Company Name	Employee ID	Employee Name	Employee First	Employee M	Employee Last	Date Hired	Date T	Employee Status	Employee Type	Pay Type	Residence State	Employment State	Department	Location	Rate of Pay	Hours	Work Ending Date
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		19.42	63.92	10/15/2018
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.45	83.01	10/31/2018
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.36	100.26	11/30/2018
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.94	74.5	11/30/2018
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		19.18	67.91	12/15/2018
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		19.47	123.78	12/31/2018
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		19.79	74.09	1/15/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.49	93	1/31/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.82	70	2/15/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		19.08	83.17	2/28/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.58	98.01	3/15/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		21.53	52.17	3/31/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.95	85.41	4/15/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.41	109.83	4/30/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		18.68	106.25	5/15/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		19.44	100.58	5/31/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		21.04	46.68	6/15/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		16.77	47.84	6/30/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		16.46	38.59	7/15/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		16.69	23.16	7/31/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		16.5	48.58	8/30/2019
ZZ Demo - Grant-1205456513		Leann Waterland				08/25/2014		Active	Full time	Hourly	MI	MI	Associate Professor		20.27	53.51	9/13/2019

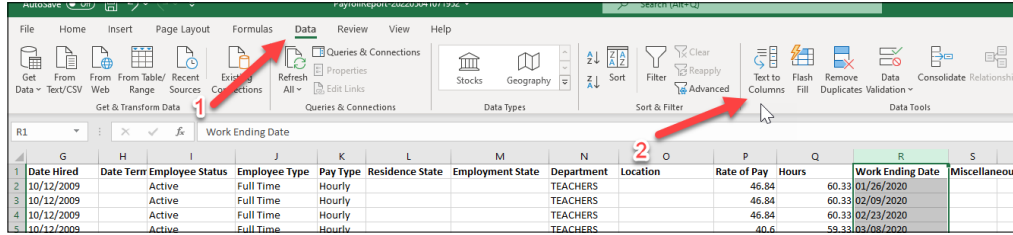
2. Convert To Date Format

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

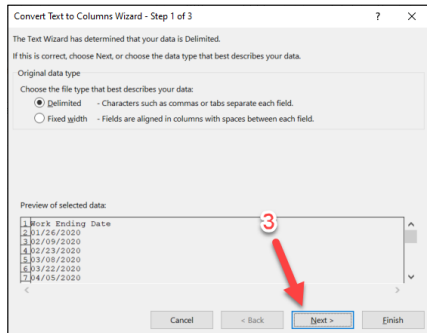
Location	Rate of Pay	Hours	Work Ending Date	Miscellaneous
	46.84	60.33	01/26/2020	
	46.84	60.33	02/09/2020	
	46.84	60.33	02/23/2020	
	40.6	59.33	03/08/2020	
	46.84	59.83	03/22/2020	
	46.84	60.33	04/05/2020	
	46.84	60.33	04/19/2020	
	46.84	60.33	05/03/2020	
	46.84	60.33	05/17/2020	
	46.84	100.33	05/31/2020	
	46.84	60.33	06/14/2020	
	46.84	60.33	06/28/2020	
	46.84	60.33	07/09/2020	
	46.84	60.33	07/26/2020	
	46.84	60.33	08/09/2020	
	49.43	60.33	08/23/2020	
	49.43	60.33	09/06/2020	
	49.43	60.33	09/20/2020	
	49.43	60.33	10/04/2020	
	49.43	60.33	10/18/2020	
	49.43	60.33	11/01/2020	
	49.43	60.33	11/15/2020	
	49.43	60.33	11/29/2020	

3. Convert Text To Columns

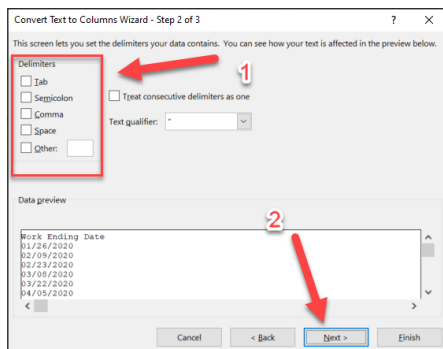
- Within the Data tab, select **Text to Columns**



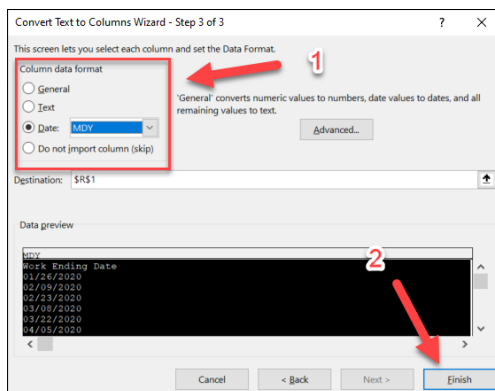
- Select **Next** (the delimited option should be pre-selected)



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

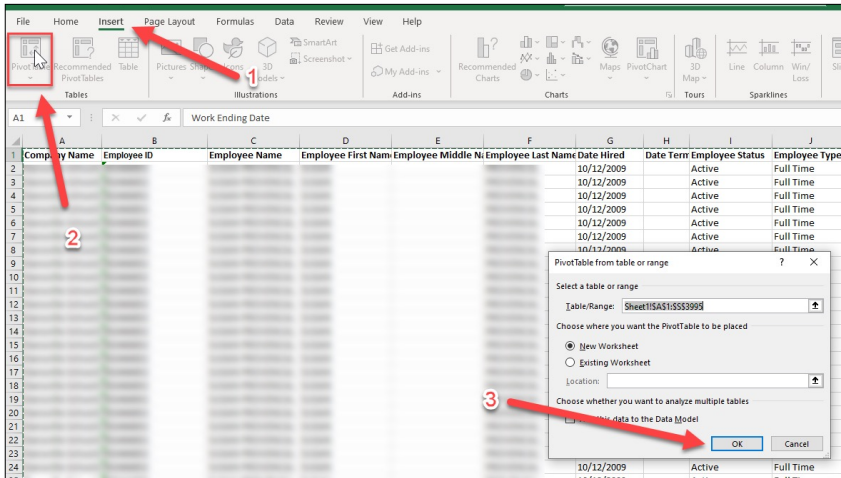


- Select **Date** under column data format and select **Finish**



Create A Pivot Table

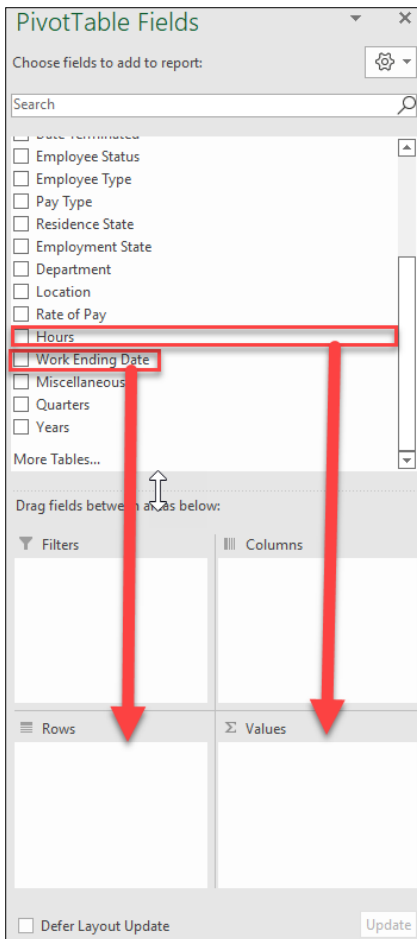
1. Create a pivot table to see total hours by pay period. Under the Insert Toolbar, select **Pivot Table**

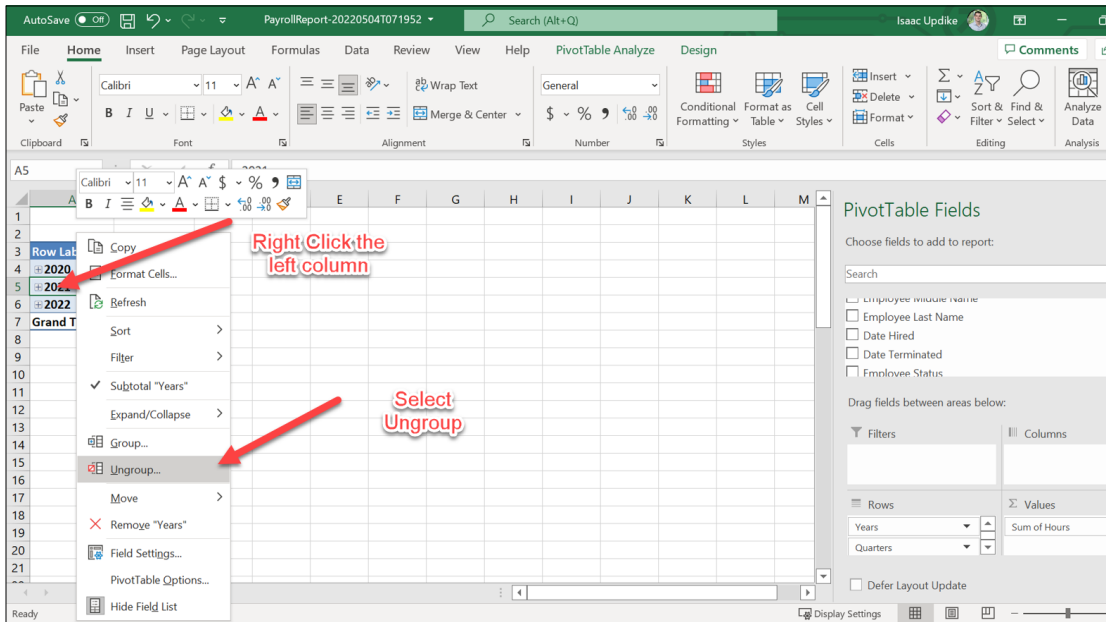


2. Using the drag-and-drop pivot table task pane, drag **Work Ending Date** into the Rows box, drag **Hours** into the Values box, and drag **Employee Status** into the Filters box

- 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.





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.

Row Labels	Sum of Hours
1/26/2020	4255.93
2/9/2020	4387.02
2/23/2020	4356.26
3/8/2020	4361.27
3/22/2020	4647.99
4/5/2020	4298.76
4/19/2020	3880.27
5/3/2020	4294.76
5/17/2020	4309.76
5/31/2020	5433.61
6/14/2020	3865.87
6/28/2020	3399.69
7/9/2020	3505.44
7/26/2020	4015.92
8/9/2020	3547.54
8/23/2020	3905.24
9/6/2020	4165.53
9/20/2020	4259.27
10/4/2020	4254.24
10/18/2020	4352.71
11/1/2020	4135.96
11/15/2020	4181.47
11/29/2020	4090.22
12/13/2020	4332.02
12/27/2020	3985.02
1/10/2021	3960.28

QUICK START USER GUIDE ACA TRACKING AND REPORTING SOLUTION



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

Compliance Risk Reports

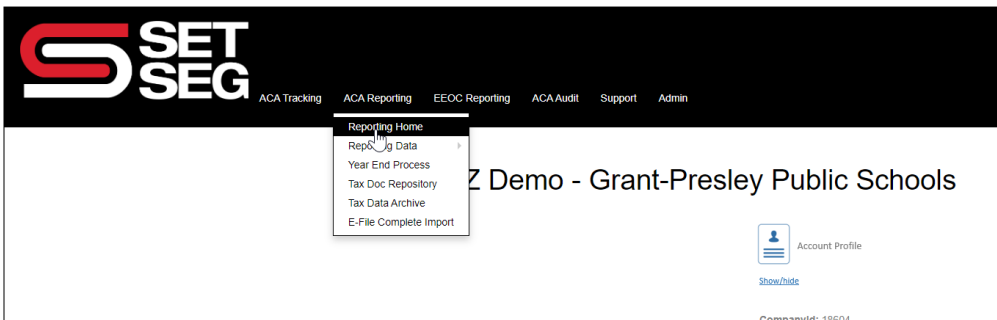
Report Purpose: Display and analyze ACA compliance risk of facing Employer Shared Responsibility Provisions (ESRP) fines.

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

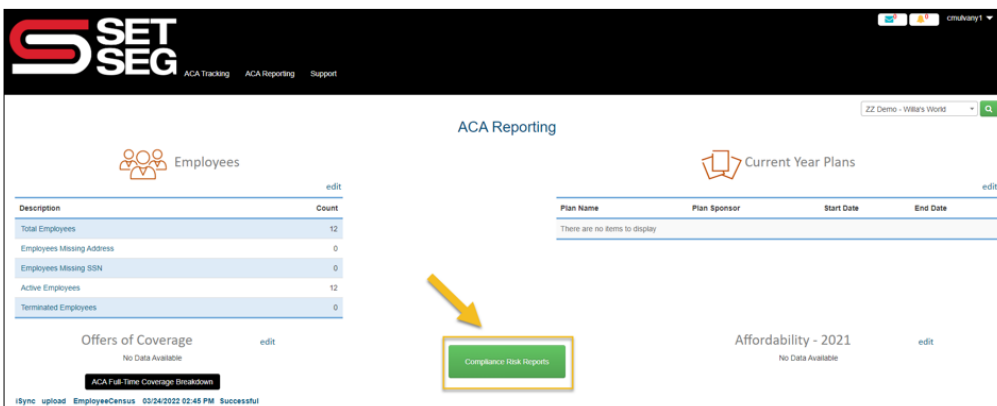
- The first report focuses on the 95% offer requirement
- The second report focuses on the potential fines for individual employees who may have received a marketplace subsidy as well as identifying those specific employees
- Both reports identify which employees are causing the compliance risk

“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.

Compliance Risk Reports
ZZ Demo - Grant-Presley Public Schools

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	404	404	100.00 %	0	0
February	2022	406	406	100.00 %	0	0
March	2022	408	408	100.00 %	0	0
April	2022	408	408	100.00 %	0	0

B Penalty Risk Check

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 Eligible Employees

January - 2022

Employee Id	Employee Name	Hire Date	ACA Status
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 Bartrum	08/13/2018	Designated Full-Time
111996932	Katey Murfin	01/03/2011	Designated Full-Time

Month	Year	Number Of Eligible Employees
January	2022	404
February	2022	406
March	2022	408

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

[Export Report](#)

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

1. 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.

NOTE 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.



QUICK START USER GUIDE ACA TRACKING AND REPORTING SOLUTION



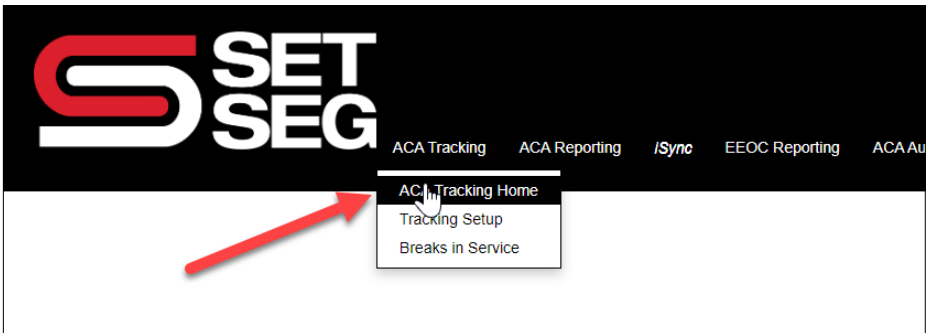
Watch the **Eligibility** section of our **SyncStream Quick Start Video** here

Eligibility & Measurement Reports

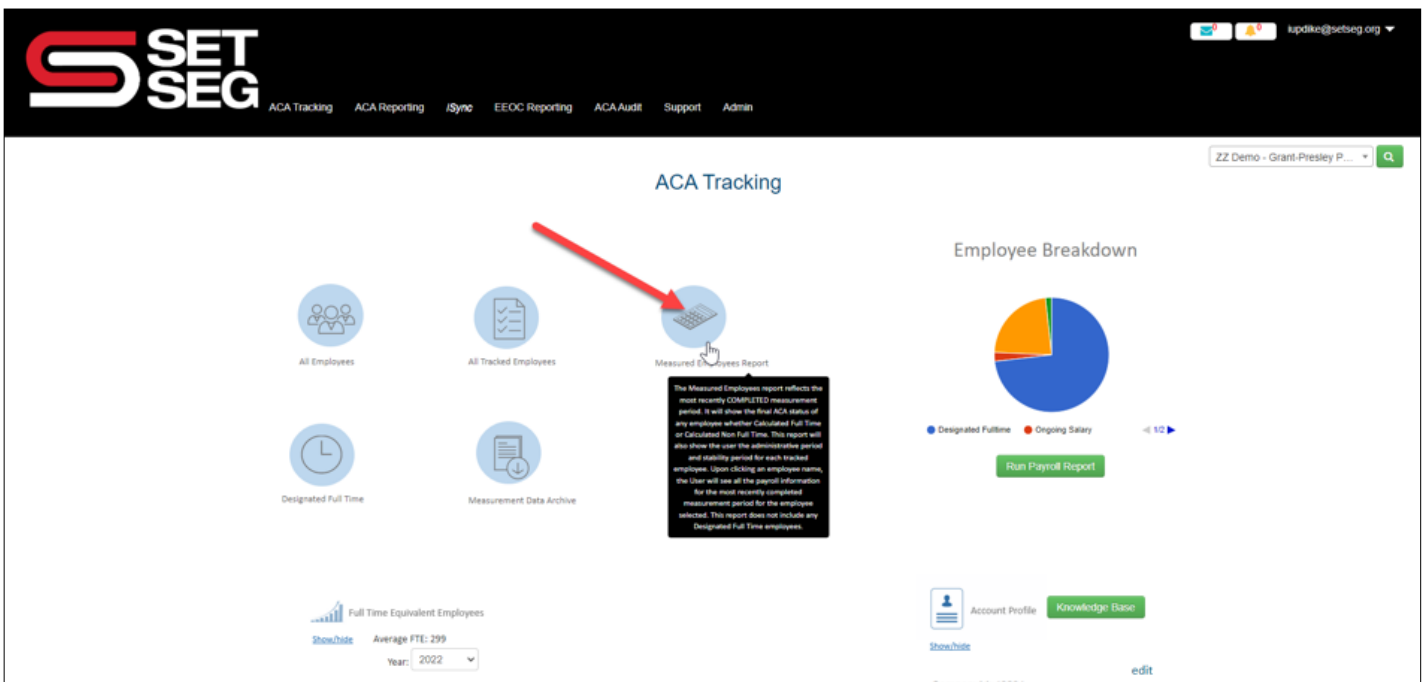
Measured Eligibility Report

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**



- Users can view and filter results using SyncStream's data table functionality. Click [here](#) for instructions on filtering data tables.

Employee ID	Employee Name	Current ACA Status	Measurement Period Start Date	Measurement Period End Date	Admin Period Start Date	Admin Period End Date	Stability Period Start Date	Stability Period End Date	Avg Weekly Hours	Date of Hire	Total Hours Worked in MP	Total Weeks Worked in MP
137375188	Kala Hornung	Calculated Non-Full-Time	07/01/2020	06/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	0.27	07/01/2015	14.00	52
143862086	Suzi Akse	Calculated Full-Time	07/01/2020	06/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	31.52	01/04/2012	1638.99	52
163119324	Kalle Cutler	Calculated Non-Full-Time	07/01/2020	06/30/2021	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	06/30/2021	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	06/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	28.49	10/15/2018	1424.60	50
236540034	Tatiana Hirschman	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	Claudia 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	Kevin Mealand	Calculated Non-Full-Time	07/01/2020	06/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	25.13	04/29/2013	1306.93	52
274456566	Jacobo Peit	Calculated Full-Time	07/01/2020	06/30/2021	07/01/2021	09/15/2021	09/16/2021	09/15/2022	31.41	10/01/2008	1633.23	52
287346639	Marios 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

✔ **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.

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

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

Designated Full-Time Employees - ZZ Demo - Grant-Presley Public Schools

Employee Department	Employment State	Residence State	Employeeid	Employee Name	Employment Type	Current Status	Employment Date	Average Weekly Hours	In Waiting Period
Associate Professor	MI	MI	105456513	Leann Waterland	Hourly	Designated Full-Time	8/25/2014	37.61	No
Financial Advisor	MI	MI	109494128	Koralie Kosiada	Hourly	Designated Full-Time	8/22/2016	28.08	No
Human Resources Manager	MI	MI	110425113	Pepe Bartrum	Salary	Designated Full-Time	8/12/2018	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	8/00/2010	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	130682353	Damara Sotheby	Hourly	Designated Full-Time	7/10/2017	21.27	No
Physical Therapy Assistant	MI	MI	131535801	Kandace Dowdie	Salary	Designated Full-Time	8/31/2009	40.00	No
Graphic Designer	MI	MI	131649205	Langston Bellini	Salary	Designated Full-Time	5/12/2014	0.00	No

✔ **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 Tracked Employees - Demo - SS Sales

Employment State	Residence State	Employee Name	Employment Type	Tracked Projected 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
CA	CA	Clayborn C Logan	Hourly	Calculated Full-Time	6/15/2019	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Mich Stokoe	Hourly	Calculated Non-Full-Time	10/15/2019	25.30	48.19	New Variable Hour	11/10/19	9/30/2020	Measurement Period
CA	CA	Damien Kerasz	Hourly	Calculated Full-Time	9/30/2007	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Sue Worwick	Hourly	Calculated Full-Time	6/15/2014	40.00	27.44	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Juliette Maggiorini	Hourly	Calculated Full-Time	11/14/2013	39.00	28.72	Ongoing Hourly	7/1/2020	5/31/2021	Measurement Period
CA	CA	Sax Westley	Hourly	Calculated Non-Full-Time	4/9/2013	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	Papa Chever	Hourly	Calculated Non-Full-Time	11/5/2016	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

✔ **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:

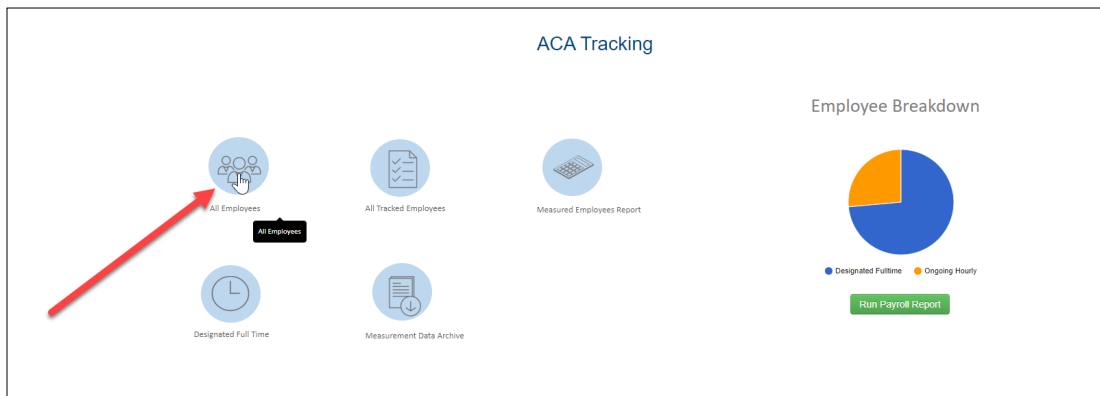
- **Employment Date** – Employee date of hire
- **Average Weekly Hours** – The average number of hours that an employee has worked weekly up to the current week of payroll in SyncStream.
- **Maximum Average Weekly Hours to Maintain Non-Full-Time Status** – If an employee's hours are lowered to an average 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.

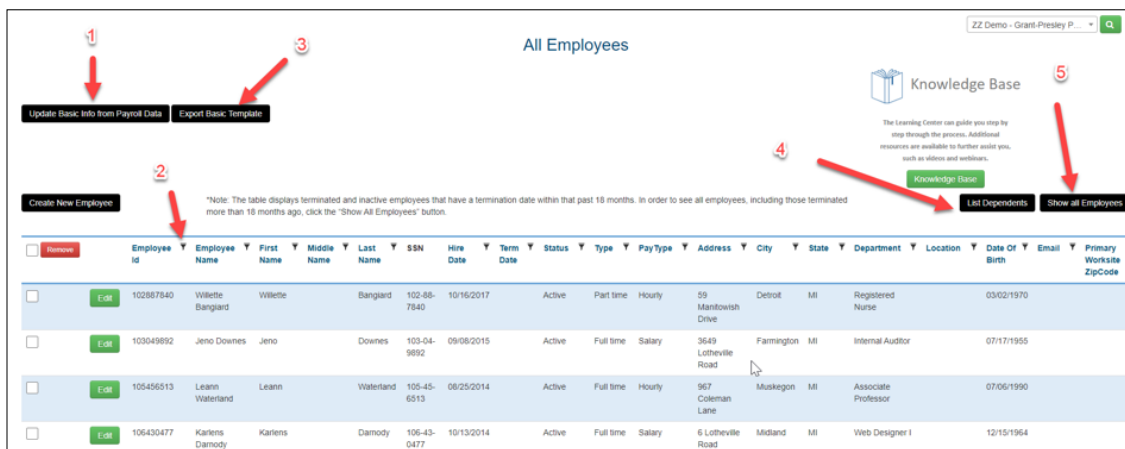
Viewing Employee Demographics & Detail

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.



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.

✔ **NOTE** This includes employees terminated more than 18 months ago.

QUICK START USER GUIDE

ACA TRACKING AND REPORTING SOLUTION



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.

Employee Department	Employment State	Residence State	Employee Id	Employee Name	Employment Type	Tracked Projected 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	To: Ho: Pal
Assistant Professor	MI	MI	10855435	Nathalie Davenhill	Hourly	Calculated Non-Full-Time	1/9/2015	0.00	9.85	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Account Coordinator	MI	MI	108960513	King Lapwood	Hourly	Calculated Non-Full-Time	3/5/2019	0.00	11.20	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Help Desk Technician	MI	MI	109851837	Nan Simester	Hourly	Calculated Non-Full-Time	12/31/2018	0.00	12.75	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	0.0
Assistant Professor	MI	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	0.0
Internal Auditor	MI	MI	137375188	Kala Hornung	Hourly	Calculated Non-Full-Time	7/1/2015	0.27	57.89	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	7.0
Technical Writer	MI	MI	143862086	Suzi Aldie	Salary	Calculated Full-Time	1/4/2012	32.12	26.87	Ongoing Salary	7/1/2021	6/30/2022	Measurement Period	832
Biostatistician III	MI	MI	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	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	174
Nurse Practitioner	MI	MI	169628186	Celestia Lowe	Hourly	Calculated Non-Full-Time	2/25/2019	0.00	9.27	Ongoing Hourly	7/1/2021	6/30/2022	Measurement Period	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	310

1. Send to Excel

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

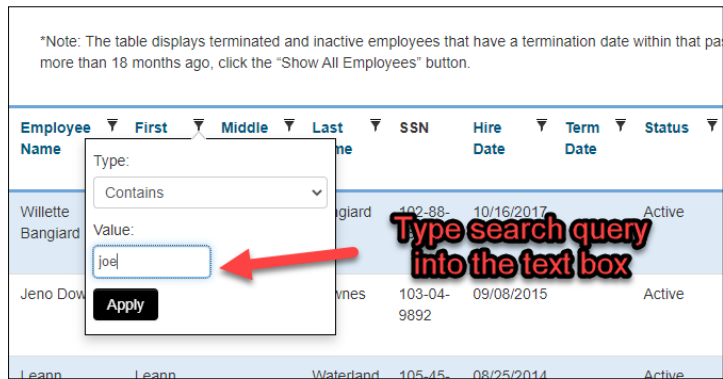
2. Filter Function

- 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: The table displays terminated and inactive employees that have a termination date within that pa
more than 18 months ago, click the "Show All Employees" button.

Employee Name	First	Middle	Last	SSN	Hire Date	Term Date	Status
Willette			giard	102-88-	10/16/2017		Active
Bangiard							
Jeno Dow			ynes	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